

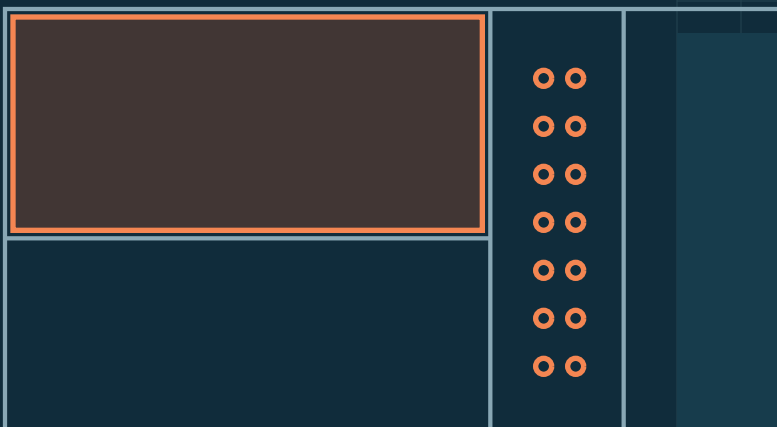


RIVET
ESTIMATOR

THE PRACTICAL USER GUIDE

Build the number. Before you build the job.

Plan Workspace 2.0: from drawing to reviewed issue.
With clear steps for upgrades, quantities and recovery.



VERIFY THE SOURCE. TRACE THE QUANTITY. REVIEW THE PRICE.

VERSION 1.9.5

rivetestimator.ca

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Your first estimate

Follow the same short sequence for a training project or a live bid.

- 1 Create the project.** Enter the customer, site and due date you know. Keep sample work separate from customer projects.
- 2 Bring in the source.** Import the original PDF, PNG or JPG. Confirm the sheet title, number and revision.
- 3 Verify the scale.** Calibrate against a known dimension on that sheet, then check a second dimension when available.
- 4 Measure the scope.** Finish each length, area or count. Give it a useful name and connect the takeoff to the estimate.
- 5 Build the price.** Check quantity, unit, waste, unit cost, taxable state and commercial adjustments.
- 6 Review the result.** Resolve unexplained warnings, compare the intended revision and save a portable backup.
- 7 Issue the customer copy.** Check scope, terms, audience and total in the preview. Open the exported PDF before sending it.

A useful first exercise

Measure one room, price one connected line, create a named revision and export a customer proposal. Then find the line's source on the plan without relying on memory.

This guide covers version 1.9.5. Features depend on your plan, device and access. Examples are illustrative; they are not construction rates or tax advice.

Install, sign in and add your profile

Use your own verified account on each permitted device.

Platform	Where to start
Windows	Use the Microsoft Store route from the official Download page.
Android	Use the Google Play route from the official Download page.
Other devices	Use the web app in a supported browser. The website lists current platform availability.

- 1 Open rivetestimator.ca/download/choose on the device you are setting up.
- 2 Sign in or create an account. If email verification is needed, use the newest confirmation message.
- 3 In your account settings, add a recognizable display name. You can add or change a profile photo using a JPEG, PNG or WebP image.
- 4 In **Account Center > Security**, set up multi-factor authentication. Scan the QR code, enter a current code and store your recovery codes privately.

Choose the setup that fits your plan

Solo and Trial: complete your profile and continue estimating. Team assignments, discussions, shared reviews and the collaboration inbox belong to Team and Enterprise. Private security, billing and app-update notices do not require Team access. Before choosing a workspace, use **Account security and billing**. See the Your account chapters for those tasks.

Before changing an installation

Back up local-only work before uninstalling, replacing a device or changing an installation channel. An app update and a workspace backup solve different problems.

Give the project a clear home

A good project record makes the next step easy to find.



- 1 Choose **New project** and use a name you will recognize after the bid closes.
- 2 Enter known customer, site, bid and due-date details. Identify who owns the estimate; leave unknown facts open for clarification.
- 3 Follow the project card's next action into the workspace. Keep project status aligned with the actual stage of the job.

Record	Example
Project	Harbourview Medical - Clinic 2 - Interior refresh
Bid reference	HV-2026-047
Plan set	Architectural - Addendum 2 - Revision 3
Estimate owner	Jordan Lee
Due-date note	18 September, 2:00 p.m. Pacific time

Make the workspace comfortable

On a wide desktop, resize the available Plans, Estimate and Team panels using their divider. Keyboard controls are available when the divider is focused, and the reset control restores its default width. Smaller screens use the compact layout.

Fit, pan and zoom change what you see on the plan; they do not establish a measurement scale. Use the calibration controls before relying on a quantity.

Upgrade to Plan Workspace 2.0 safely

The workspace owner reviews the conversion; existing projects and original plans are retained.

- 1 Update every editing device from its original Store. Finish drawing drafts, sync eligible changes and export a portable backup before upgrading.
- 2 As Owner, open Cloud and choose Review Plan Workspace 2.0 upgrade. Review the saved workspace and Cloud checks, then choose Start reviewed upgrade.
- 3 Keep the app open while plan files and Cloud baselines are checked. If interrupted, return on the same device and use Resume reviewed upgrade; keep its saved data.
- 4 Open upgraded workspace. In Cloud, complete the reviewed Team approval upgrade and recipe calculation upgrade when offered. Each stage retains recovery checkpoints.
- 5 Update other devices before joining the upgraded workspace. Older clients may be held or read-only; do not clear their data to bypass an upgrade warning.

Before continuing

The public web workspace supports the reviewed upgrade. Native delivery follows Store approval. A separate test copy remains available for practice and never activates your Cloud workspace.

Check mixed scales and exact dimensions

Keep each quantity tied to its sheet, region and verification evidence.

- 1 Confirm the sheet and revision before opening Scale & geometry. Calibrate the drawing against a printed known dimension.
- 2 Use a separate scale region for a differently scaled detail. Check its boundary and select the intended calibration before measuring.
- 3 Check a second independent known dimension and save the result. Review scale evidence and resolve failed or stale checks.
- 4 When changing calibration, review the affected quantities before applying it. Verify exact dimension inputs and deductions against the drawing.
- 5 Keep scan measurements separate from supported vector snapping. Coverage labels and curve approximations do not certify the source drawing.

Before continuing

Changing zoom does not change calibration. A saved check documents the dimension you verified; it does not prove all drawing dimensions are correct.

Trace scopes back to their sources

Combine compatible measured quantities while retaining the original members.

- 1 In Takeoffs, select a row and choose Create scope, or choose Group selected for several compatible measurements.
- 2 Review each member, operation and unit. Plan Workspace 2.0 scopes can combine compatible measurements across sheets while keeping each source revision.
- 3 Open Quantity tools - evidence, recipes, rooms and repeats. Use the quantity evidence ledger to check contributions and deductions.
- 4 Select a linked quantity to return to its drawing sources. Resolve stale or missing source evidence before pricing or issuing.
- 5 Check estimate units and linked quantities after editing a measurement. Revisit any calculation marked for review.

Reuse material, labour and equipment calculations

Recipe definitions and applied results remain separate so changes can be reviewed.

- 1 Open Quantity tools - evidence, recipes, rooms and repeats, then Scope recipes. Choose Create recipe or Load editable example.
- 2 Check inputs, output units, allowances, pack sizes and the editable example assumptions. Save recipe definition only after reviewing them.
- 3 Choose the measured scope and enter the project inputs. Select Review recipe quantities and inspect the calculation and changed estimate lines.
- 4 Choose Apply reviewed recipe when quantities and prices are appropriate. Existing prices remain until a reviewed calculation is applied.
- 5 After a source or recipe changes, review the current result again. Starter examples are editable estimating aids, not certified trade rates.

Review finishes, repeated units and spatial quantities

Enter project assumptions explicitly and inspect the result before applying.

- 1 For wall finishes, choose Create wall-finish takeoff. Review wall heights, finished faces and each opening, then Review wall-finish quantities and Apply reviewed wall finishes.
- 2 For repeated rooms or units, choose Create repeated takeoff. Name each occurrence, inspect exceptions and detached instances, then Review repeated quantities and Apply repeated quantities.
- 3 For pitch, rises, drops and spacing, choose Create spatial takeoff. Check pitch, individual vertical lengths and spacing exclusions.
- 4 Choose Review spatial quantities and inspect the ledger before Apply reviewed spatial quantities. Rises and drops add; they do not cancel.
- 5 Recheck edited source geometry. Wall finishes remain separate from room floor area; exceptions are not automatically identical to the template.

Align revisions and review their effect

A comparison supports an explicit review; it does not automatically approve replacement scope.

- 1 Retain the previous drawing and import the replacement with its correct identity and revision.
- 2 Open revision alignment, select the earlier and later drawings, and choose Open original drawings.
- 3 Pick corresponding features on both pages. Use a separate feature away from the anchors for the independent check.
- 4 Review alignment and the quantity change preview. Check retained, removed and changed scope and its price effect before applying eligible changes.
- 5 Keep unresolved changes open for review. A revision comparison cannot detect every specification or design change.

Review imports and retain issued evidence

Keep outside data and the final issue tied to the intended revision.

- 1 Use Libraries and tools to open the supported Excel or CSV import review. Select the intended worksheet and check mapped columns, units and prices before applying.
- 2 Review supported PDF annotations against the original page. Unsupported annotations or missing files require manual review.
- 3 Before issuing, resolve source, calibration, quantity and pricing checks. Confirm required Team approvals for the exact estimate revision.
- 4 Use the issue review and Confirm and prepare issue only after the evidence and audience are correct. Retain the issued baseline and open the exported PDF.
- 5 Export marked plans with the intended review layer. Keep source drawings, a portable backup and customer/internal issue copies with appropriate access.

Before continuing

An issued baseline records reviewed inputs. It does not replace the estimator's responsibility for the final bid.

Bring in the right plan revision

Start every quantity with an identifiable source.

- 1 Open **Plans** and import the original PDF, PNG or JPG supplied for the job.
- 2 Check each sheet's number, title, revision and orientation against the drawing and transmittal.
- 3 Choose **Fit** to inspect the sheet. Confirm that dimension labels and relevant details are legible.
- 4 Record the issue or addendum in your project notes and keep the original file in your project records.
- 5 When revised drawings arrive, identify the replaced sheets and affected measurements before continuing.

A revision intake note

Record	What to capture
Received	Date, source and transmittal or addendum reference.
Replaced	Superseded sheets and specification sections.
Affected	Takeoffs, estimate lines, risks and proposal wording.
Next action	Rework, verify, clarify, carry or hold; name an owner.

A similar-looking sheet can still change the estimate

Reconfirm scale and affected quantities on replacement sheets. Watch for mixed-scale details, cropped pages and a different print scale. Do not silently carry a superseded quantity into the new issue.

Retain the source drawing even when it is already attached. If a plan needs to be relinked after a restore, you will need that original file.

Workspace reference: Plans - page 48

Verify scale with a known dimension

Printed scale is a starting point. A check on the actual sheet is stronger evidence.

- 1 Open the intended sheet and confirm its revision.
- 2 Choose **Calibrate** or **Verify with two points**, where shown.
- 3 Place the two points at the ends of a clearly labelled dimension. Use precision adjustment if needed.
- 4 Enter the real length in feet or metres. Ratio-labelled metric sheets default to metres; confirm the unit before accepting.
- 5 Check the calibrated state, then measure a second known dimension elsewhere on the sheet when possible.

What you find	What to do
No verified scale	Stop quantity pricing and calibrate from a known dimension.
Detected scale only	Verify it against a dimension on the same revision.
Two checks agree	Proceed, while keeping mixed-scale details separate.
Checks disagree	Check units, page scaling, detail scale and the source revision.

Confirm detected scale is not a two-point check

That action accepts the selected printed scale. It does not prove that the imported drawing matches it. Obtain clarification when the source is ambiguous.

Rivet cannot guarantee the accuracy of a drawing or your calibration. Record any unresolved scale limitation before it affects the estimate.

Make a takeoff another person can follow

A quantity is useful when its scope, unit and source are clear.

Tool	Use and review
Linear / length	Measure a path; check endpoints and the unit.
Perimeter	Measure a boundary; check closure and exclusions.
Area	Measure a surface; finish the shape and review deductions.
Count	Count repeated items; check for missing or duplicate symbols.
Wall, room, volume	Use the available derived tools with explicit height or depth assumptions.

- 1 Confirm the sheet, revision, layer and calibrated state.
- 2 Choose the tool that matches the bid unit. Zoom in for corners or crowded symbols.
- 3 Finish the geometry before changing tools or leaving the workspace.
- 4 Name the measurement by scope and location, then connect it to the intended takeoff or estimate line.
- 5 Review open shapes, duplicate counts, unexpected units and disconnected quantities.

Name for a handoff

LVT flooring - Waiting 101 - A2.1 tells a reviewer more than a colour or a generic room name. Ask the reviewer to find the source without coaching.

Check every high-value measurement and sample repetitive work by zone or sheet. Review complex closures, openings and deductions at a useful zoom.

Workspace reference: Takeoffs - page 49

Count items with trade symbols

Use a recognizable marker for repeated items, with the project's drawing legend as your reference.

- 1 In **Plans**, select the correct sheet and verify its scale. Choose **Symbols**. Finish or cancel any open non-count measurement first.
- 2 Search by name or filter by trade. Choose a symbol, then set **Rotation** and **Marker size** in the preview. Use the star to add a favorite.
- 3 Choose **Use symbol** to activate **Count**. Place one point per item, check for omissions or duplicates, then choose **Finish**.
- 4 Review the saved count's name, layer, quantity and source before connecting it to a takeoff or estimate line.

Change a saved count

Select the saved Count measurement and open **Count symbol** in its properties. Apply a new symbol, size or rotation to its markers. Unlock a locked count first. A changed marker returns the measurement to **Draft** for review; its points, quantity, name and prices stay intact.

To return to the standard dot, choose **Ordinary count marker**, then **Use ordinary count**. If an imported symbol is unavailable, Rivet shows a question mark and an **unavailable symbol** label. Review that reference and choose a replacement when needed; the quantity is preserved.

Keep the count and its appearance together

Favorites and **Recent** are local preferences for the current account on this device. Saved Count symbols travel with measurements in workspace backups. Recoverable local count drafts retain the selected symbol. If **Draft changes need attention** appears, keep Rivet open, choose **Retry draft save** and check that the warning clears. Unfinished work may otherwise exist only in memory. Finish, confirm the local save and make a workspace backup before leaving or replacing a device.

On web and Windows, **Export marked PDF** includes the chosen symbols and a count schedule. Marked-plan PDF export is not available in the Android app. A symbol does not set an item's specification, unit price or estimating rate.

Workspace reference: Trade symbols - page 52

Organize groups and apply waste

Keep the measured amount distinct from how you organize or adjust it.

Create a takeoff group

- 1 Select two or more eligible takeoff rows, then choose **Group selected**.
- 2 Enter a **Group name** and choose **Create group**. To add rows later, select the existing group with the additional eligible rows.
- 3 Use a member's **Open measurement** action to inspect its source. **Ungroup** keeps the underlying measurements when the group is eligible.

Grouping requires linked plan measurements with compatible units, sheet and revision. Manual or copied unlinked rows are not eligible. Estimate-linked rows cannot be grouped or ungrouped, even if their price is zero. Cutout groups cannot be ungrouped. Layer and trade filters are separate from groups.

Apply waste after checking the base quantity

- 1 Verify the measured base, then enter the waste factor supported by your material layout, cuts, laps or ordering requirements.
- 2 Check the adjusted quantity and rounding. Record unusual factors and recheck them after a material or drawing change.

Illustrative calculation	Quantity
Measured floor area	100 m ²
Estimator-entered waste	8%
Adjusted amount before order rounding	108 m ²

Apply each adjustment once

The example is arithmetic, not a recommended waste rate. Do not include the same waste in both the geometry and the waste field. Supplier pack sizes may require a separate, documented order conversion.

Connect quantities to estimate lines

A reviewer should be able to move from a price back to the plan.



- 1 Create a connected estimate line for plan-derived scope. Use a manual line for genuine non-plan work, such as a documented mobilization allowance.
- 2 Check description, quantity, unit, cost type, unit cost and taxable state.
- 3 Open the line's quantity or cost trail. Follow the connected takeoff, adjustment and measurement to the source sheet.
- 4 Resolve unexplained zero prices, zero quantities, disconnected items and unit mismatches.
- 5 Add an internal note when a rate, conversion or scope assumption needs explanation.

Check	A useful question
Identity	Can I distinguish this work from neighbouring scope?
Quantity	Does the value and unit match the source?
Rate	Is the source current, with its commercial assumptions known?
Completeness	Have placeholders and unexplained zero values been resolved?

Give manual lines their own evidence

Record the quote, duration, allowance or calculation behind the amount. Use a lump-sum unit only when that is the actual pricing basis. Manual lines need review even when they have no plan geometry.

Workspace reference: Estimate - page 50

Review rates, markup and tax

Finish the direct cost before reviewing the commercial additions.

Cost	Evidence to retain
Material	Supplier quote, date, unit, freight and order constraints.
Labour	Hours or productivity basis and the applicable crew rate.
Equipment	Rental or internal rate, duration and mobilization assumptions.
Subcontract / allowance	Included scope, exclusions and the basis of an unresolved amount.

Where available, use **Cost library**, **Inventory**, **Assemblies**, **Trade packs**, **Bid leveling** or **Crew calculator** to support your work. Check every reused component, quantity factor, unit and rate before relying on it.

Commercial review

- 1 Normalize supplier units to the estimate unit once and verify the conversion.
- 2 Check direct costs, then each markup, overhead or profit percentage and the displayed calculation order.
- 3 Confirm taxable lines, the entered tax rate and the displayed tax base.
- 4 Recalculate a summary independently and compare the grand total with the revision and proposal preview.

Tax choices need a deliberate decision

Rivet calculates using the choices and rate you enter. It does not determine tax obligations. Obtain qualified advice if the treatment is uncertain.

Keep confidential vendor comparisons, margins and pricing rationale in the internal record. Recheck tax and commercial assumptions after a customer, scope or jurisdiction change.

Make uncertainty visible

Give every material uncertainty an owner and a next action.

Record	Use it for
Risk	A condition that could change scope, cost, timing or outcome.
Allowance	A stated amount for an unresolved selection or extent.
Alternate	A separately described and priced option.
Exclusion	Work outside the offered scope.
Assumption / clarification	A condition or interpretation the offered price depends on.

- 1 Write the uncertainty in plain language and identify the affected scope.
- 2 Choose a response: resolve it, request clarification, carry an allowance or exclusion, or leave the estimate unready.
- 3 Name the person responsible and record the next action.
- 4 Update the estimate and proposal consistently. Close the item when the supporting evidence is in place.

Example: finish not yet selected

The client has not selected flooring for Waiting 101. Carry an explicitly stated allowance or obtain a selection. Record what the allowance covers and what would change it; do not hide an unsupported rate in a precise-looking line.

Keep internal risk analysis private unless it belongs in the customer offer. Check that exclusions do not contradict work listed as included.

Keep revisions understandable

Preserve the number before changing the scope or the price.

Create a named estimate checkpoint

- 1 Create a named revision before a significant drawing, rate, customer or commercial change.
- 2 Use a reason that describes the event: **Addendum 2 reviewed** is more useful than **New revision**.
- 3 Make the change in the current estimate and compare quantities, rates, scope and totals against the checkpoint.
- 4 Investigate unexpected movement before reviewing the current estimate for issue.

Checkpoint	Why keep it
Before an addendum	Understand the effect of the new source.
Quantity / pricing freeze	Separate measurement changes from rate changes.
Before issue	Retain the reviewed basis of the customer offer.
After negotiation	Explain the difference from the issued offer.

A shared revision is a deliberate Team publication

In **Project Team > Shared revisions**, **Publish revision** creates a fixed copy for colleagues to inspect and review. Later edits need another shared revision. A routine save or autosync does not publish a new issue.

Review again after restoring a revision

Restoring a local named revision keeps a safety checkpoint and clears Ready to issue. Recheck the restored estimate before marking it ready. A shared revision is a separate, fixed Team review target.

Review before marking ready

Use the warnings to support a deliberate review of the exact estimate.

Review area	What must be understood
Source	Correct drawing revision and checked calibration.
Quantity	Finished geometry, scope coverage, units and connections.
Price	Rates, waste, taxable state and an independent total check.
Commercial	Markup, allowances, alternates, exclusions and assumptions.
Risk	Material uncertainty resolved, owned or visibly carried.
Customer	Correct identity, scope, terms, currency and total.
Recovery	Named revision and a retained portable backup.

- 1 Run your own review from the plan source to the grand total.
- 2 Have a colleague independently inspect high-value lines and a sample from each major scope when your review process calls for it.
- 3 Resolve warnings or record the reason for an appropriate acknowledgement.
- 4 Confirm the intended revision before marking it **Ready to issue** and preparing the proposal.

Ready to issue is a review state

It is not a guarantee of accuracy or completeness. Do not acknowledge away missing scope, a wrong customer, an unexplained zero price or unresolved tax treatment.

A Team approval applies to its exact published revision. It does not automatically approve later edits or replace your customer proposal checks.

Prepare the customer proposal

The final check belongs to the exact file you will send.

- 1 Open **Proposal** and confirm the reviewed estimate and customer details.
- 2 Read scope, inclusions, exclusions, assumptions, alternates, payment terms and validity.
- 3 Select the customer audience and inspect the preview. Confirm currency, tax and total against the approved estimate.
- 4 Read the privacy summary and check the internal information excluded from this output.
- 5 Export the PDF. Open the saved file, verify its filename and attach that exact customer copy.
- 6 Retain the issued PDF together with its revision, review record and portable backup.

Customer output	Internal information to protect
Identity, project and offered scope	Confidential unit costs and margins
Terms, assumptions and exclusions	Markup reasoning and estimator notes
Tax, currency and total	Vendor comparisons and internal risk analysis

Use a new revision for a correction

Do not replace the retained issued PDF with a later draft. Record the change, repeat the review and check the new customer file before sending it.

Record the issue date, exact revision, customer recipient, filename, delivery channel and authorized issuer in your bid records. If you send the wrong file or use the wrong recipient, follow your organization's incident process promptly.

Workspace reference: Proposal - page 51

Invite the people doing the work

Team and Enterprise collaboration uses individual accounts and workspace access.

- 1 An authorized administrator opens **Account > Team** and invites each colleague using their own email address.
- 2 The colleague signs in with the invited, verified account and accepts the invitation.
- 3 If the new browser needs secure workspace access, keep its request open. An authorized connected colleague checks the person and device, chooses **Approve device**, then **Confirm approval**. A pending notice opens **Review this device** before that confirmation.
- 4 Open the project's **Team** workspace. Use **Members** to return to workspace member management.

Set expectations before the first shared bid

- Agree who owns the estimate, who assigns work and who can approve an issue.
- Use a recognizable profile name and photo so colleagues can identify activity.
- Use project discussions for project decisions and named tasks for actions.
- Review member roles, pending invitations and connected devices when responsibilities change.

An invitation is not permission to share a login

Each person should use their own account. Do not email workspace keys or share passwords, MFA codes or live device-pairing codes.

On the requesting device, use **Check now**, or open its approved notice and choose **Finish connecting this device**. If the request page was closed or restarted, start a new request on that device. Opening or refreshing a notice does not approve or connect a device. An expired, replaced or unavailable request cannot approve another request. Controls depend on current role and plan.

Assign work with enough context

A useful task says what needs to happen, where, and who owns it.

- 1 Open **Project Team > Team work** and choose **Assign work** if your role allows it.
- 2 Write an action-led title and add the details needed to complete it.
- 3 Use **Attach to** to select the available project, sheet, measurement, takeoff or estimate context.
- 4 Choose **Assigned to**, a **Due date** if needed and the priority. Then choose **Save team work**.
- 5 Open the task to discuss it or update its status. Use the available edit and status controls as responsibilities change.

Example task

Check the north stair flooring detail

Confirm the finish boundary on A2.1 against Addendum 2. Attach the relevant sheet or takeoff, assign the person doing the check and give the task a meaningful due date.

Keep the list useful

Use **Open work**, **Assigned to me** or **All work** to focus the project list. Review the status after sending a change, especially if the device is offline or a conflict is reported.

A queued change is not confirmation that another person has received it. Leave the app's saved draft and recovery controls available until the outcome is clear.

Mention people when their attention is needed

Relevant assignments, comments and mentions can create team notifications. Routine autosync stays quiet; it is not a substitute for a clear task or deliberately published revision.

Keep decisions with the project

Use discussions and replies so the next person can understand the decision.

- 1 In **Team work**, choose **Discussion**. Add a clear title, the question or decision, and an available **Attach to** context.
- 2 Open the discussion or task and enter a **Reply**. Include the relevant drawing reference or agreed next action.
- 3 Expand **Mention workspace members** and select the people whose attention is needed.
- 4 Resolve a discussion when the question has been answered. Reopen it if new information changes the decision.

Less useful	More useful
Please check this.	Confirm whether the finish continues through Door D12 on A2.1.
Done.	Checked Addendum 2: finish stops at D12. The takeoff now matches.
Price changed.	Supplier quote dated 18 September replaces the allowance for this scope.

Keep the next action explicit

If a discussion leads to work, create or update the assigned task. A comment explains the decision; a task records responsibility and status. Keep confidential pricing detail within the appropriate internal context.

Keep the conversation attached to work

This release provides project discussions and replies. It does not provide general direct messaging or a public social feed.

If the linked item is no longer available, check the current project and revision before acting on an older conversation.

Publish a revision and request review

Give the reviewer a fixed issue, not a moving estimate.

- 1 Open **Project Team > Shared revisions** and choose **Publish revision**.
- 2 Give the issue a clear title and describe what changed. Publishing preserves the current project quantities, estimate lines, rates and proposal details.
- 3 Inspect the shared issue. Use the comparison to investigate changes from another published revision. Monetary comparisons require matching currencies.
- 4 On the latest shared revision, choose another reviewer. Add an optional review due date and time, then choose **Request review**.
- 5 The assigned reviewer chooses **Inspect published revision**, checks the issue, adds review notes and confirms they reviewed that exact revision before deciding.

What a deadline means

Use the displayed local date and time. A deadline must be in the future and within 365 days. An eligible pending review requested more than 24 hours ahead can receive one reminder 24 hours before it is due, plus one overdue notice. These are not repeated daily reminders.

A newer revision needs a current review

An older review cannot approve the latest issue. If a new shared revision supersedes the review target, inspect the new revision and request the appropriate review. An approval is not a guarantee that the estimate is correct.

Keep your named estimate revision and customer proposal checks alongside the Team decision. The published review record is one part of the issue process.

Use My Work and the notifications inbox

Find actions that need your attention without turning every save into an alert.

My Work

Use **My Work** to find assignments and pending reviews from projects synchronized to this device. It is not a complete list of every project stored elsewhere. Check any offline or partial-results message and synchronize missing projects before relying on the list.

The in-app inbox

Open the notification control and choose **All** or **Unread**. Open a notice to inspect its available source; use **Mark read** separately. Access is checked again when you follow a link.

Updates covered in this release	Typical reason to open one
Invitations and membership	Respond to an invitation or understand an access change.
Tasks and project conversations	Act on an assignment, status change, reply or mention.
Published revisions and reviews	Inspect a shared issue, review request, decision or deadline.
Sync recovery	Resolve a problem that needs your attention.
Device approval	Review the exact request or finish on its requesting device.
Account export	Check your requested file's ready or failed status.

Routine autosync, unchanged saves and your own actions do not add team alerts. Withdrawn invitations update in place. Notification preferences control the available team activity and **Account exports** category.

Account Center has separate private security, billing and app-update lists with their own read controls. They do not require the Team inbox. See the Your account chapters for each workflow.

Delivery availability

Use the in-app notices. Android system notifications and optional email require an available service and your explicit settings. Optional email needs fresh consent after a verified email change. Existing transactional account emails remain separate.

Review private security notices

Check what changed before deciding whether to change account access.

Open **Account Center > Security**. Before choosing a workspace, open **Account security and billing > Security notices**. Your personal history is available without Team access.

- 1 Read the event and time. Notices cover a new sign-in, password or confirmed MFA change, a workspace deletion schedule or cancellation, and device revocation.
- 2 Choose **All** or **Unread**. Use **Load older notices** when available. History is retained for a limited period; it is not a permanent account archive.
- 3 Use **Mark read** after reviewing an item. **Mark all read** covers eligible history up to the current snapshot, including older notices not yet loaded. Later arrivals remain unread.

Use the current control

- **Manage sign-in protection** opens the current security controls. Check your own activity before changing protection settings.
- **Review current devices** opens current sessions or device access. Before workspace selection, you can inspect sessions; Cloud devices need an available workspace.
- **Review deletion request** opens that workspace's exact request. Check the workspace, status and recovery deadline before using any available cancellation control.

Opening is not approval

Opening a notice does not mark it read, enable MFA, revoke access or cancel deletion. An expired or unavailable request has no substitute action. Security notices stay on; keep passwords and recovery codes private.

If your session changes, sign in again before continuing. A historical notice does not restore access to a workspace you can no longer use.

Review billing and trial notices

Match the earlier event to the workspace's current access and payment route.

Open **Account Center > Billing**, or **Account security and billing > Billing notices** before workspace selection. Billing history is separate from the Team inbox and security notices.

- 1 Read the notice and date. Events include trial ending or ended, payment failed, access restored, plan changed, cancellation scheduled and subscription ended.
- 2 Choose **All** or **Unread**; use **Load older notices** when offered. Use **Mark read** separately. **Mark all read** includes older eligible notices not yet loaded, up to the current snapshot; later arrivals remain unread.
- 3 Choose **Review billing** when available. Check the named workspace and its current plan and access; the notice describes an earlier event.
- 4 For another accessible workspace, choose **Select this workspace to continue** and complete any save or transition check. Then use **Continue to billing controls** when your current role permits.

Keep the payment route clear

Use the website subscription controls for website purchases and the Google Play controls for Play purchases. Provider management is another explicit action. Opening a notice or selecting a workspace does not start checkout, open a payment portal or change the subscription.

Access determines what you see

Current owners, administrators and billing managers can see the commercial detail they are allowed to manage. Other eligible members receive only generic access changes. A missing source or former workspace does not redirect you to an unrelated subscription.

If you cannot manage billing, contact the workspace owner or billing manager. An older notice is not proof of today's access; check the current status before acting.

Request and save an account export

Keep a private copy of your account data, separately from project recovery files.

An eligible owner or administrator requests their own export from **Account Center > Exports**. Another administrator cannot use your requester-only file.

- 1 Choose **Request account export**. Keep the current account and workspace selected while Rivet prepares the file.
- 2 Choose **Refresh** to check progress, or open your ready or failed export notice. Opening the notice does not mark it read or download the file.
- 3 When ready, check **Available until** and choose **Download**. The file expires after 24 hours. **Cancel download** stops the current preparation or handoff.
- 4 Finish the platform's save action and confirm the file is where you intended. Keep the generated file extension and store it privately.

Platform	What confirms the handoff
Windows	Choose a location in Save. Rivet reports saved after the file write succeeds.
Android	Choose where to keep the file in the share sheet. The chooser returning does not prove another app saved it.
Browser	Check browser downloads to confirm the started download completed.

A private data copy, not a restore file

The download is JSON-gzip account data. Rivet encrypts its stored server copy; keep the downloaded file private. It does not replace the portable .rivet workspace backup or encrypted Team recovery references, and it has no account-restore command.

For failed, expired or unavailable exports, use **Start a new export** and follow the displayed retry wait. After Android sharing, keep a lasting copy promptly; its temporary handoff copy is available only briefly. Do not send account exports through ordinary support email.

Check verified app updates

Review the release for this installed edition before opening its download route.

- 1 Open **Account Center > App updates**, or **App updates** in the account entry before workspace selection. Choose **Check for updates** while connected.
- 2 If a newer verified release is offered, check the app version and package version or build. Choose **Review update** to read that release's approved notes.
- 3 When ready, choose **Open Microsoft Store**, **Open Google Play** or **Open Android download**, as shown for this installation. Follow that route's own instructions.
- 4 Use **Mark read** separately after reviewing a notice. Reading notes or opening a download route does not mark it read, install an update or restart Rivet.

Stay with this installation

Windows package versions can differ from the app version. Android uses its build number and compatible signing identity. Keep Store and direct Android installations on their own update routes; preserve local-only work before any uninstall or channel change.

Choose whether to receive new notices

Set **Show new app update notices** and choose **Save update setting**. This applies across your account's devices. Turning notices back on lets only new releases create new notices; existing notices keep their read state. Manual checks and review remain available.

When no offer can be verified

Availability requires a currently verified publication for a supported installed Windows or Android edition. A browser session or unrecognized installation cannot supply that identity. An offline check or unavailable release record does not prove the app is current. Reconnect and check again; a candidate or withdrawn release is not an update offer.

Rivet reports opening the Store or download route, not a completed installation. Check the installed app after following the provider's update process.

Connect Cloud and your devices

Keep an independent copy of important work while using optional Cloud sync.

- 1 On the first authorized device, open **Settings > Rivet Cloud** and choose **Connect Cloud workspace**.
- 2 For colleagues, use the invitation and exact device-approval steps in **Invite the people doing the work**. For another of your own permitted installed devices, use a one-time pairing code from a connected device.
- 3 Enter a manual pairing code within ten minutes. It is intended for one use.
- 4 Before switching devices, check that the intended workspace revision has synchronized.
- 5 Review current connected devices and revoke lost, retired or unrecognized devices. A revocation notice records the access change; it does not reconnect the device.

Understand the protection

Rivet encrypts workspace data before upload. Authorized service processing supports workspace validation and device access, so Rivet Cloud is not a zero-knowledge service. Protect your account, devices, recovery material and exported files as part of your normal project security.

Treat pairing codes as secrets

Use a code only to connect your permitted device. Do not post it in a project discussion or send it to Support. If a code expires, create a fresh one on a connected device.

Check current capacity

Device, named-member and active-project allowances depend on the plan. Consult the current FAQ rather than assuming that an old limit still applies. Keep completed project status accurate and review access when people leave.

Recover protected access

If Cloud is paused after a key change or interrupted reconnect, choose **Review protected recovery**. Read the confirmation, then choose **Recover protected access** or **Resume protected recovery**. Rivet verifies retained encrypted records and saved requests across your workspaces before resuming Cloud. **Cancel** keeps the saved versions. If verification stops, retain the current work and retry the reviewed recovery. Cloud does not replace an independent portable backup.

Work offline and sync deliberately

Local work and shared updates have different connection requirements.

Available condition	What to expect
Verified installed app access	Local estimating can remain available through paid access and the applicable grace period.
Access cannot be renewed	Existing work remains available to read, export and back up; check the account status for editing access.
Connection required	Sign-in, pairing, invitations, account changes, private notice checks, account exports, app-update verification and Cloud transfer.
After a Windows reboot	Reconnect once before resuming plan edits. Reopening the app is not a computer reboot.

- 1 Before starting on another device, check the local and Cloud revision status.
- 2 Confirm the latest local save and keep a portable backup before replacing a workspace. Read the specific sync or recovery choices shown.
- 3 A manual upload can send non-conflicting changes even when Cloud has a newer full backup. A full download replaces the active local workspace after confirmation and retains the previous local workspace as a recovery copy.
- 4 After editing, confirm sync status before moving to another device. Save a portable backup at important milestones.

Saved locally is not Cloud confirmation

The label confirms a device save only. A queued Team update may still be waiting to send. My Work can be partial on this device. Never discard unsent work just to clear a warning.

If access expires or a service is unavailable, keep the current workspace and backup files intact. Reconnect and resolve the displayed account or sync condition before repeating protected actions.

Resolve a saved draft or sync conflict

Inspect both versions before deciding how the shared record should change.

- 1 Open the project's Team workspace and read the pending-update message. Choose **Review saved draft** when offered.
- 2 Compare the saved local draft with the available shared record. Check identity, version and the change you intended.
- 3 Use the guided action appropriate to that conflict. Keeping the workspace version or rebuilding a replacement preserves a recovery reference for inspection.
- 4 Confirm the resulting status before creating further changes to the same item.

When the send outcome is unknown

A connection failure can occur after the server accepted an update. Use the app's retry for that saved operation so it can check the same update. Do not create a duplicate task, discussion or revision just because confirmation was interrupted.

Recovery copies

Recovery copies preserve the original draft and the version it was compared with, where available. Inspect them to understand the decision. A read-only recovery reference does not automatically become an outgoing Team update.

Preserve first, remove later

Export important recovery references before removing local copies. If storage, account access or the workspace key is unavailable, keep the existing file and resolve that condition before trying again.

A shared revision remains a fixed issue. Publishing another issue is a deliberate action, not a way to silently replace an older review target.

Export an encrypted recovery file

This backup preserves Team recovery references for the current project.

- 1 In the Team recovery area, choose **Export recovery backup**. For a single item, use **Export this recovery copy** or **Export saved draft**.
- 2 Finish the download or the native save/share panel. Check that the encrypted file actually saved in the location you intended.
- 3 Keep it in an approved location. Local copies remain available after export; remove them only when you intend to.

Restore for inspection

- 1 Sign in with the same account and unlock the same workspace and project with the required workspace key.
- 2 Choose **Restore recovery file** and select the Rivet recovery JSON file. Files are limited to 16 MB.
- 3 Review the verified reference count and export time. A saved draft reference may already have been shared.
- 4 Confirm the restore or choose **Cancel restore**. Restoring adds read-only recovery copies and skips copies already present.

Choose the right file

This encrypted recovery file contains references, not live project data or plans. Restoring does not queue outgoing Team updates. Use a portable workspace backup for projects. **Request and save an account export** describes a separate private account-data copy without a restore command.

If the file is damaged, incomplete or cannot be opened with the account and workspace key, stop and retain the original. Do not edit the JSON to force an import.

Keep a portable workspace backup

Retain the project independently of the current app, browser or device.

- 1 In **Settings**, find **Workspace backup** and choose **Download backup**. Save one at scope freeze, pricing freeze, issue and before replacing an app or device.
- 2 Finish the download or save/share panel and save at least one copy away from the Rivet device in a secure location you control.
- 3 Use a recognizable date, project and milestone in the filename, while preserving the generated file extension.
- 4 Check that the file exists and has content. Retain source plans and issued documents alongside your backup records.
- 5 To import a backup, choose **Restore backup**. Read the project and revision summary and preserve the current workspace if you may need it.

Keep together	Purpose
Original drawings	Verify sources and relink plans if needed.
Named revision and notes	Explain the retained estimating state.
Exact issued customer PDF	Preserve the document actually sent.
Portable workspace backup	Recover the project independently.
Team recovery file, if needed	Inspect saved drafts and archived recovery references.

The .rivet file is not encrypted

A normal portable backup verifies the local save and includes the referenced plans. Store it privately. It excludes Team discussions, reviews and queued-update archives. Account exports and encrypted Team recovery files have different contents; neither replaces this project backup.

Restoring replaces the active local workspace, including its projects, after confirmation; the previous local workspace is retained as a recovery copy. Older or emergency backups may need **Locate** or **Relink plan**. Practise with a non-live backup in a test workspace and check a connected line and test proposal.

Choose the next safe action

Read the exact message before retrying or replacing anything.

Situation	Next action
Email not confirmed	Open the newest verification email, then sign in again.
Session expired	Sign in again and repeat the protected action.
Pairing code expired	Create a new code on a connected device and use it within ten minutes.
Newer Cloud revision	Check the saved local state and available sync choices. Preserve unsent work before confirming a full workspace replacement.
Plan missing after restore	Use Relink plan with the original PDF or image.
Plan view feels wrong	Choose Fit; check the current sheet and orientation. Recheck calibration separately.
Team access changed	Check your active account and workspace, then contact the workspace administrator.
Saved draft could not send	Inspect the saved operation and use its guided retry or recovery action.
Recovery import rejected	Keep the original file; confirm the same account, project and workspace key.
Account export unavailable	Refresh its status; start a new export after the displayed retry wait.
App update cannot be verified	Reconnect and check App updates. Do not change installation channel to clear a notice.

Do not clear storage as a first troubleshooting step

A browser reset, uninstall or device replacement can remove local-only work. Preserve a portable backup and important recovery references before taking those steps.

If the cause is still unclear, collect the device, app version, action and exact message for Support. Avoid repeated changes that make the original outcome harder to understand.

Account, purchases and support

Use the account route that matches the purchase and keep sensitive information private.

Purchase or access needs attention

- **Google Play:** in **Account center > License**, use **Restore purchases** while signed into the Google account used for the purchase.
- **Website subscription:** use **Review billing and trial notices** to check the exact workspace, then continue to its current billing controls. Provider management is a separate action.
- **Editing access:** check the account's current license and connection state. Existing work remains available to read, export and back up when editing access is unavailable.

For personal history or a data copy, see **Review private security notices** and **Request and save an account export**. Keep account exports out of ordinary support email.

A useful support request

- Your verified account email and support reference, if one is available.
- Platform, device, operating system and the app version shown in Account Center.
- What you were doing, the exact message, and what changed immediately before it.
- A sanitized screenshot or a small approved diagnostic attachment when useful.

Keep secrets out of the request

Do not include passwords, card details, MFA or recovery codes, keys, purchase tokens, pairing codes or private project files. Use a specifically approved secure support route if sensitive project material is needed.

Support: support@rivetestimator.ca

Help page: rivetestimator.ca/support

Rivet Help can find instructions in the local guide. It does not inspect your project, verify quantities or prices, decide tax treatment, or carry out project edits for you.

A calm bid-day sequence

Adapt this recommended schedule to the size of the job and your approval process.

When	Action and retained evidence
Day before	Confirm drawing intake, unresolved scope and the person responsible for each open item.
Before final review	Finish quantity and rate checks; save a pricing-freeze revision and backup.
Review window	Independently check high-value scope, exceptions and the intended issue.
Before export	Resolve approval conditions; verify customer, terms, privacy and total in the preview.
Before sending	Open the saved PDF and verify the exact file and recipient.
After issue	Retain the customer file, revision, approval record and portable backup.

When a late addendum arrives

- 1 Record its receipt and affected sheets. Create a checkpoint before editing.
- 2 Identify affected quantities, prices, risks and proposal wording. Reverify replacement-sheet scale.
- 3 Compare the revised amount with the checkpoint and repeat the review, preview, export and attachment checks.

Escalate a real limitation

A deadline does not resolve an unverified quantity, missing scope or wrong customer. Decide explicitly how an unresolved condition affects the offer and record the decision.

Set a useful team routine

Start with a small set of shared habits that survive a handoff.

Habit	Recommended standard
Naming	Use project, location, source and business event where relevant.
Measurement	Check the actual sheet revision and keep quantities traceable.
Pricing	Retain source, date, unit and commercial assumptions.
Collaboration	Use named tasks for actions and discussions for decisions.
Review	Inspect the exact revision and repeat checks after material changes.
Recovery	Keep independent backups and occasionally test a non-live restore.

Train with one small project

- 1 Set up a secure account and a clearly marked training project.
- 2 Import a plan, verify scale, and make a named length, area and count.
- 3 Build a connected line, explain waste and rates, and create a revision.
- 4 Review and export a customer copy, then practise backup and recovery. Team members can also practise a task, discussion and exact-revision review.

When someone leaves

Transfer their open work and review responsibilities, preserve required records, then revoke devices and member access at the authorized time. Record the administrator and any exceptions. Review pending invitations and unrecognized devices regularly.

Before you issue: one-page check

Use this printable checklist alongside your organization's approval process.

Source and quantity

- ☐ Correct project, drawing revision and original source retained.
- ☐ Scale checked against known dimensions; mixed-scale details understood.
- ☐ Geometry finished; duplicates, deductions, waste and disconnected quantities reviewed.

Price and scope

- ☐ Quantities and units match the source; rates and conversions are supported.
- ☐ Unexplained zero values and placeholders resolved.
- ☐ Markup, tax, risks, allowances, alternates and exclusions checked.
- ☐ Independent total check agrees with the intended revision.

Customer and recovery

- ☐ Customer, scope, terms, validity, currency and total verified.
- ☐ Customer audience selected; privacy summary and exact exported PDF inspected.
- ☐ Correct file and recipient confirmed; issued record and backup retained.

Sign-off record	Complete in your bid file
Project / revision	_____
Estimator / reviewer	_____
Decision / conditions / date	_____

Ready-to-issue status and Team approval support this process; they do not guarantee accuracy or replace professional review.

Names and notes that stay useful

Use these examples as a starting point, not required app formats.

Record	Example
Project	Harbourview Medical - Clinic 2 - Interior refresh
Takeoff	LVT flooring - Waiting 101 - A2.1
Revision	2026-09-18 - Addendum 2 reviewed - JL
Backup	2026-09-18_Harbourview_Pricing-freeze (keep the generated extension)
Proposal	2026-09-18_Harbourview_Rev3_Proposal.pdf

Risk note

Condition: what is uncertain.

Affected scope: item and location.

Effect: quantity, rate, schedule or price.

Response: clarification, allowance, exclusion or another decision.

Owner and due date: who acts next, and when.

Evidence: drawing, quote or correspondence.

Rate note

Source and date: supplier, library or historical basis.

Units and conversion: source unit, estimate unit and checked factor.

Commercial basis: currency, freight, tax and validity.

Review: person and date.

Revision reason

Checkpoint before Addendum 2. Review flooring quantities on A2.1, replacement supplier rates and customer exclusions before the next issue.

A short glossary

The terms that connect the plan, price and review.

Term	Meaning
Calibration	Relating drawing distance to a known real-world dimension on the same revision.
Takeoff	A named quantity with its measurement, unit and source.
Adjusted quantity	The measured base after a visible adjustment such as waste.
Connected cost trail	The path from an estimate line through takeoff and measurement to its plan source.
Allowance	A stated amount for an unresolved selection or scope.
Named revision	An estimate checkpoint retained before subsequent change.
Shared revision	A deliberately published fixed issue for Team inspection and review.
Ready to issue	A review state, not a guarantee of completeness or accuracy.
Customer view	A proposal audience that omits internal estimating details.
Local-first	Work is retained on the device, with Cloud used to connect authorized devices.
Portable workspace backup	An independent recovery file for workspace data.
Team recovery backup	Encrypted drafts and recovery references, restored read-only.
Account export	A private JSON-gzip account-data copy; not a project or account restore file.

When a label differs

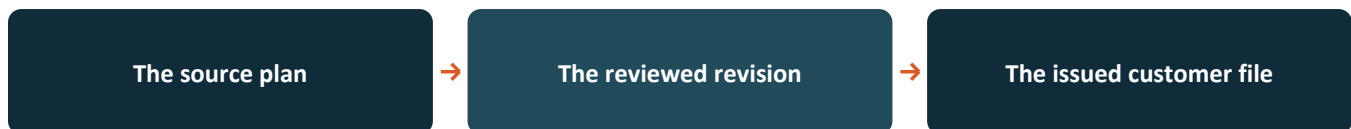
Follow the current screen and official help. Controls depend on the installed version, plan, role and device.

Official help, in one place

Use the canonical Rivet website for installation and current account guidance.

Need	Official page
Task instructions	rivetestimator.ca/guide
Installation	rivetestimator.ca/download/choose
Cloud and devices	rivetestimator.ca/cloud
Plans and common questions	rivetestimator.ca/faq
Troubleshooting	rivetestimator.ca/support
Release information	rivetestimator.ca/release-notes
Privacy	rivetestimator.ca/privacy
Support email	support@rivetestimator.ca

Keep three things easy to find



Retain the portable backup alongside them. For installed-app availability, use **Check verified app updates**; general release information is not proof that an update is offered for this installation.

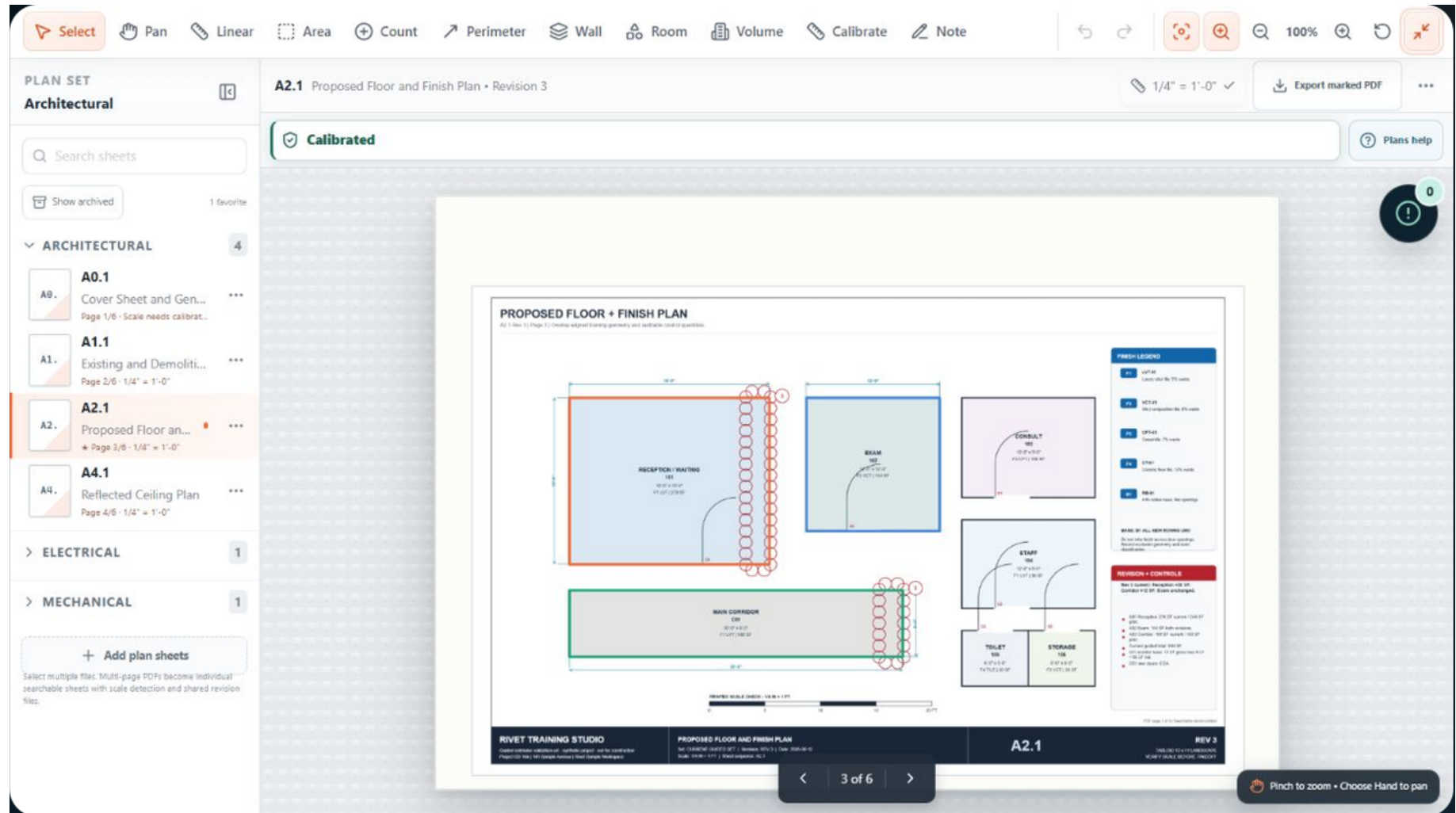
Rivet Estimator

Build the number. Before you build the job.

User Guide | Version 1.9.5

Prepared for the 1.9.5 release. Feature availability depends on the installed version, plan and enabled services.

Plans: keep the source in view



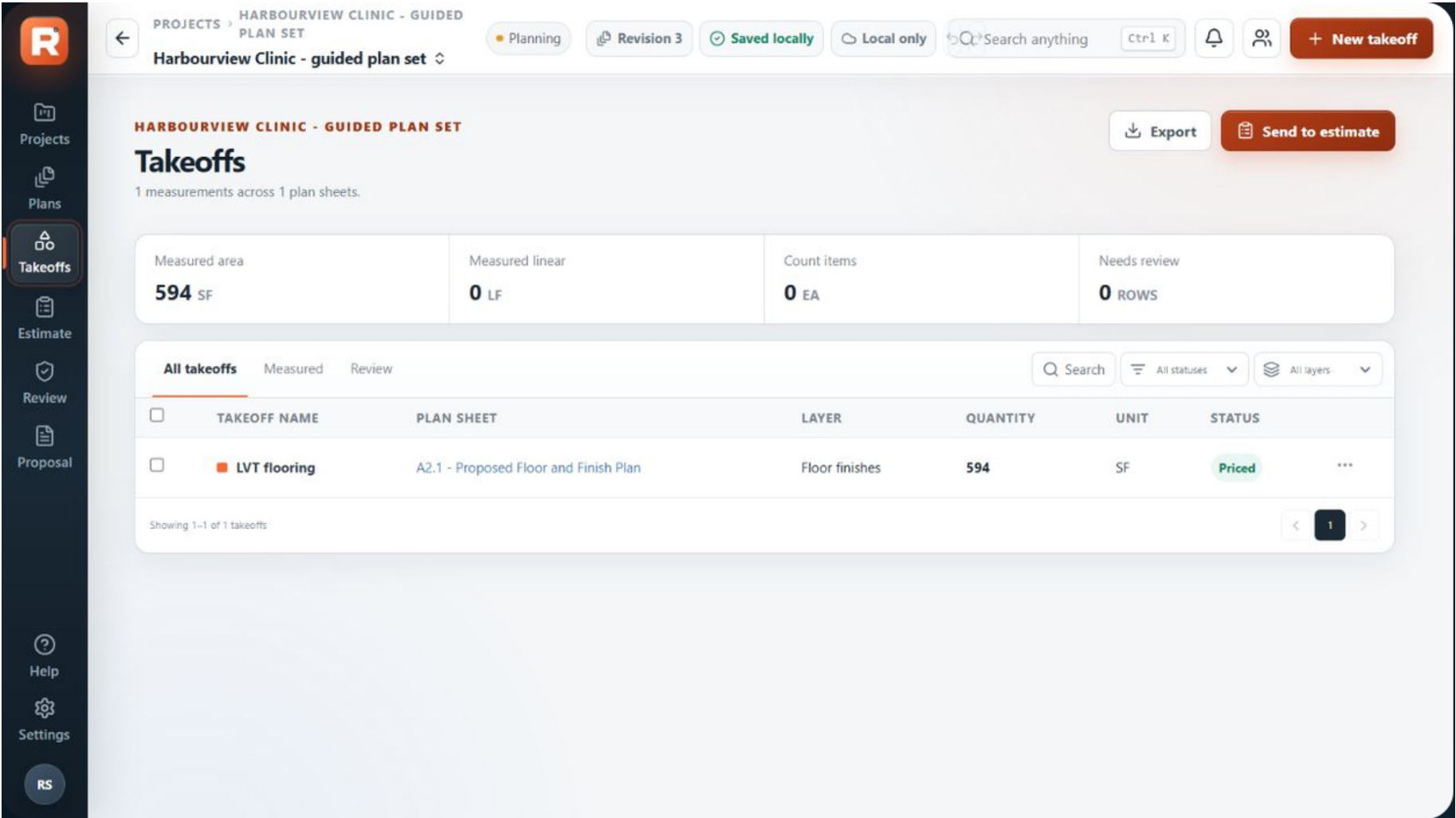
01 Sheet list: check the drawing and revision before measuring.

02 Calibration: verify a known dimension on the selected sheet.

03 Tools: finish the geometry, then give the measurement a useful name.

Guided sample shown. Example quantities and prices are not estimating advice; controls vary by version and device.

Takeoffs: follow the quantity



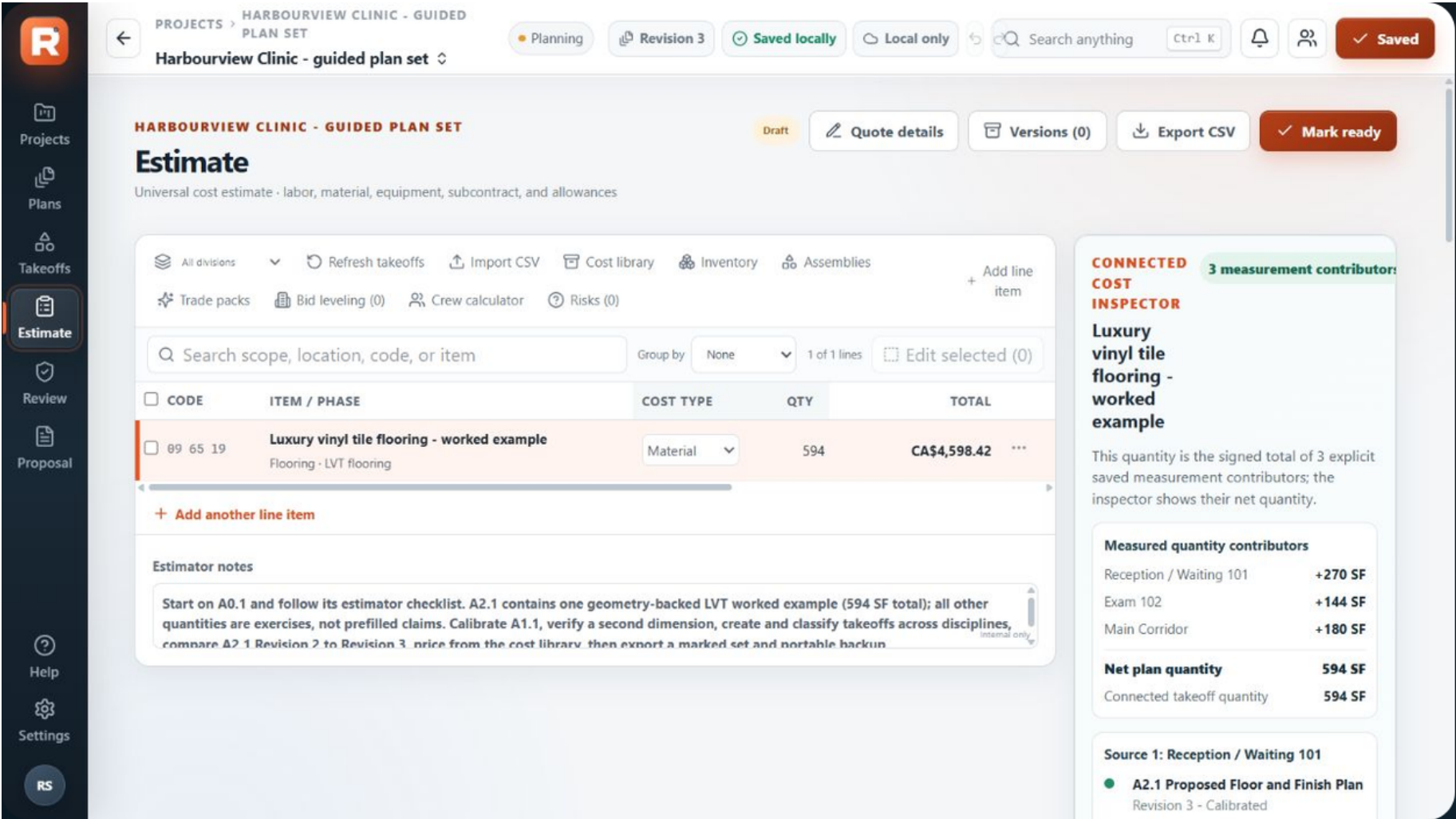
01 Name and source: make scope and sheet identity recognizable.

02 Quantity and unit: check both before sending work to the estimate.

03 Status and filters: find items that still need attention.

Guided sample shown. Example quantities and prices are not estimating advice; controls vary by version and device.

Estimate: inspect the cost trail



- 01 Estimate line: confirm description, cost type and quantity.
- 02 Connected cost inspector: inspect the contributing measurements.
- 03 Ready state: review the estimate before marking it ready for issue.

Guided sample shown. Example quantities and prices are not estimating advice; controls vary by version and device.

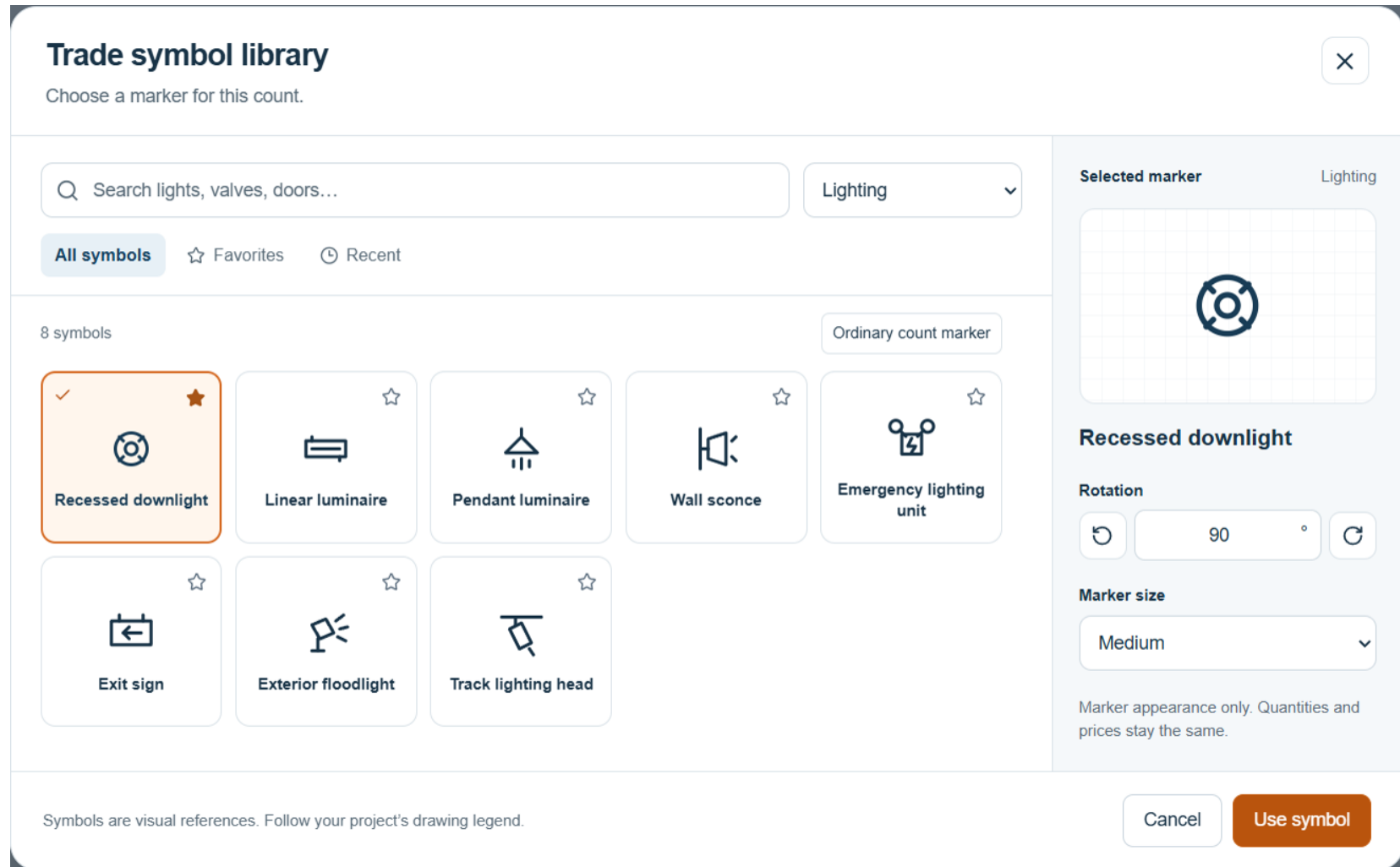
Proposal: check the customer copy

The screenshot shows the Rivet Estimator interface. On the left is a dark sidebar with icons for Projects, Plans, Takeoffs, Estimate, Review, Proposal (highlighted), Help, Settings, and a user profile JP. The top navigation bar includes a back arrow, 'PROJECTS > RIVET GUIDED PLANS SAMPLE', a 'Guided sample' button, 'No plan revision', 'Saved locally', 'Local only', a search bar, and a 'Proposal details' button. Below this, the 'RIVET GUIDED PLANS SAMPLE' section has a 'Draft' status and buttons for 'Quote details', 'Versions (0)', 'Export CSV', and 'Mark ready'. The main content area is titled 'Proposal' with the instruction 'Choose the revision and customer, verify privacy, preview, then export'. It features a 'CUSTOMER ISSUE FLOW' section with a 'PREPARATION REQUIRED' tag. The flow includes steps: Revision (checked), Customer (checked), Scope (checked), Terms (checked), 5 Preview (active), and 6 Issue. Below the flow are three panels: 'REVISION' with 'Current estimate' and a 'Choose revision' button; 'CUSTOMER' with 'Jordan Lee · Harbourview Medical' and an 'Edit customer and scope' button; and 'ESTIMATOR REVIEW' with 'Mark this revision ready after review', '30 days · CAD', and 'Complete estimator review and deliberately mark this revision ready.' A 'Customer-safe output' section explains that it includes customer identity, scope, estimate summary, terms, and total, but excludes internal unit cost, markup reasoning, risks, notes, and vendor bids. At the bottom are three buttons: 'Preview exact customer copy', 'Download customer PDF', and 'Email for customer review'.

- 01 Revision and customer: confirm the intended offer.
- 02 Privacy summary: check which internal details are excluded.
- 03 Preview and issue: open the exact exported customer file before sending it.

Guided sample shown. Example quantities and prices are not estimating advice; controls vary by version and device.

Trade symbols: choose a count marker



- 01** Find the item: search or choose a trade. Star a symbol to keep it in Favorites.
- 02** Check the preview: choose Rotation and Marker size for this count.
- 03** Apply deliberately: Use symbol selects the marker. Place count points, then Finish.

Version 1.9.5 picker shown with an illustrative Lighting selection.