

# Win more federal work, faster.

A reference for the PAG Intel portal — setup, daily workflow, price intelligence, security-clearance filtering, AI drafting, plan limits, and FAQs.

**Free trial:** 10 opportunity searches + 1 AI proposal. Admin accounts are unlocked and won't see the trial banner. For higher limits, email [dustin@plantholtadvisory.com](mailto:dustin@plantholtadvisory.com).

## 1 · GET SET UP (10 MIN)

1. Complete your profile: capabilities, NAICS, UEI, certifications.
2. Upload your capability statement on the Profile page.
3. Set the “active security clearance” toggle to match your team.
4. Create one focused alert for your strongest NAICS.

## 3 · READ THE PRICE CHIP

- **\$ value** = published award amount.
- **~\$ value** = estimate from comparable NAICS x agency awards.
- Estimates now drop \$0 / sub-\$1K placeholders and require a minimum sample size (5+ at NAICS-4, 10+ at NAICS-2) for sharper accuracy.
- Click any chip for the low–median–high range (winsorized p5/p95) and the closest comparable awards.

## 5 · TRACK BIDS

- Save opportunities to the Bids board.
- Attach documents, notes, and team comments.
- Export the proposal as a polished PDF when ready.

## 2 · FIND OPPORTUNITIES

- Live SAM.gov feed, filtered to NAICS, agency, set-aside, price, and due date.
- Each card shows an AI fit score against your profile.
- Toggling the clearance filter refreshes the list instantly and excludes notices that require a clearance you don't hold.

## 4 · DRAFT WITH AI

1. Open an opportunity → *Draft Proposal*.
2. AI grounds the draft in your profile, capability statement, and historical win patterns.
3. Go / No-Go panel shows HHI, top-vendor share, and \$/day burn for the NAICS x agency bucket.
4. Always human-review pricing, dates, certs, and compliance before submitting.

## 6 · STAY CURRENT

- Alerts deliver matches by email.
- Re-check the Opportunities page each morning.
- Refine your profile monthly — sharper inputs win.

## WHAT'S NEW

- **Smarter contract-value estimates** — placeholder awards excluded, NAICS-4 x agency buckets preferred, winsorized low/high bands.
- **Security-clearance filter that actually filters** — toggling the checkbox now refreshes the list and excludes “clearance”, “secret”, and TS/SCI notices even before enrichment runs.
- **Faster opportunity detail loads** with cached Go/No-Go market metrics.
- **Admin accounts** no longer see the free-trial banner.

## FAQ

### Why is a description or attachment missing?

SAM.gov rate-limits attachment requests. Missing content auto-fills within a few hours.

### Why did unchecking the clearance box change my results?

PAG Intel now excludes notices whose title or description signals a required clearance, in addition to enriched *required\_clearances* data.

### How accurate are the contract value estimates?

Each estimate is built from a minimum sample of comparable NAICS x agency awards with \$0 placeholders removed. Treat the median as a planning anchor, not a quote.

### How accurate are AI proposals?

Treat as a strong first draft. Always human-review pricing, dates, and compliance before submitting.

### I hit my search / proposal limit.

Email [dustin@plantholtadvisory.com](mailto:dustin@plantholtadvisory.com) for a subscription tier. Admin accounts are unlocked by default.

**Is my data private?**

Yes — profile, bids, proposals, and attachments are row-level-scoped to your account.