RELEASE NOTES

Version 2020.21.0 Nov 12, 2020

INTRODUCTION

This document describes the features included in version 2020.21.0 release of the ConstructConnect Platform.

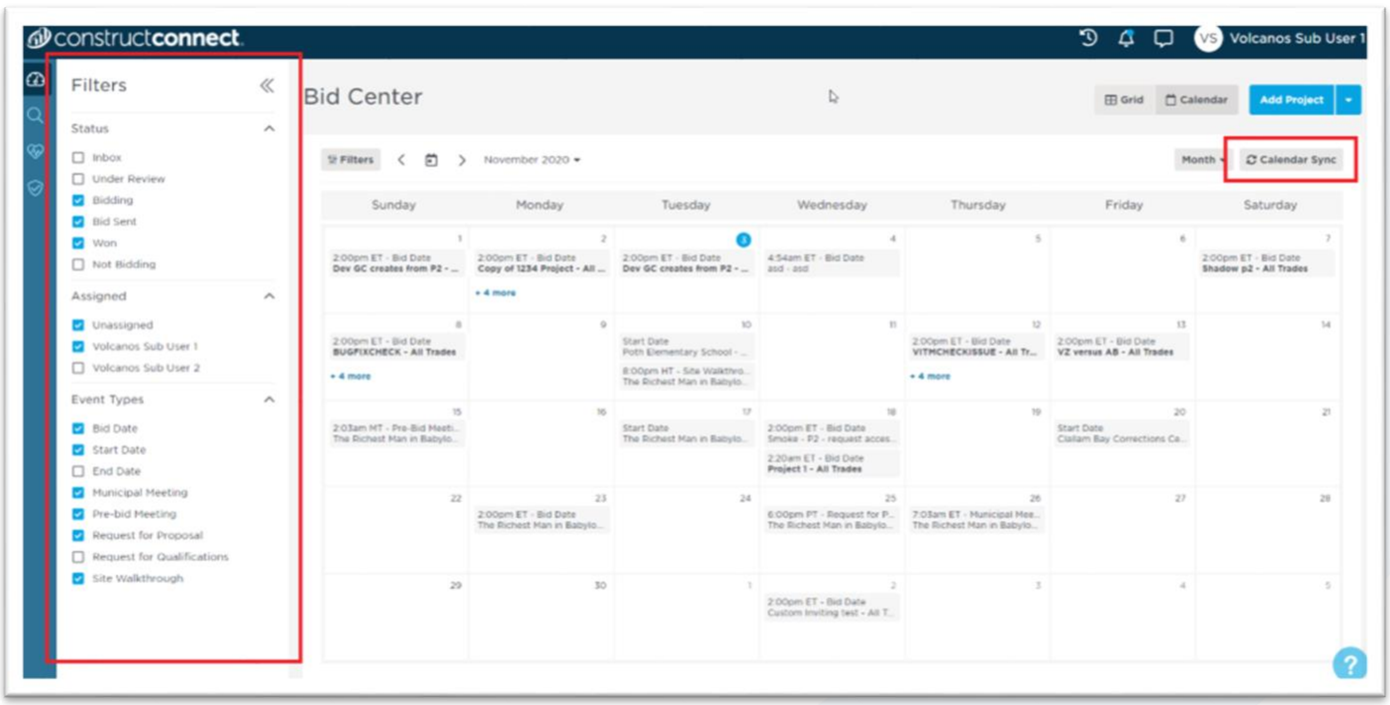
CONSTRUCTCONNECT PLATFORM

BID CENTER

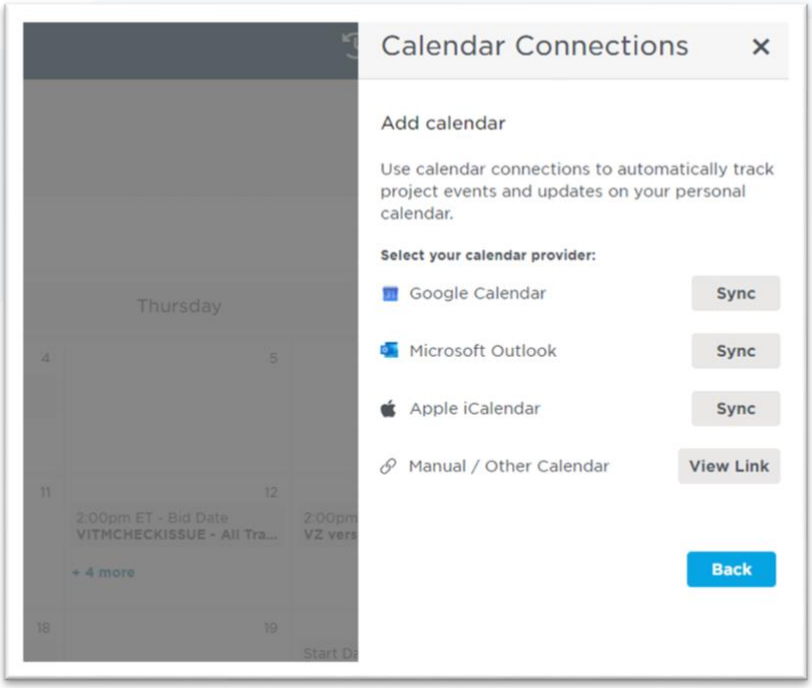
Calendar Sync

- ✓ **Value:** Users can now sync their Bid Center project events to their external calendars
- ✓ **Value:** All synced events are updated automatically
- ✓ **Value:** Sync frequency is defined by user on the external calendar side
- ✓ **Value:** Synced events are based on users filter selection
- ✓ **Value:** Users filter selection can be updated and resynced at any time
- ✓ **Value:** Last Sync Date is displayed in BC to monitor for potential connection issues
- ✓ **Value:** Google Calendar, Microsoft Outlook, and Apple iCalendar can be synced via dedicated buttons. All other calendars can be synced via manual link
- ✓ **Value:** Multiple calendars can be Calendar synced simultaneously
- ✓ **Value:** Available to paid users only

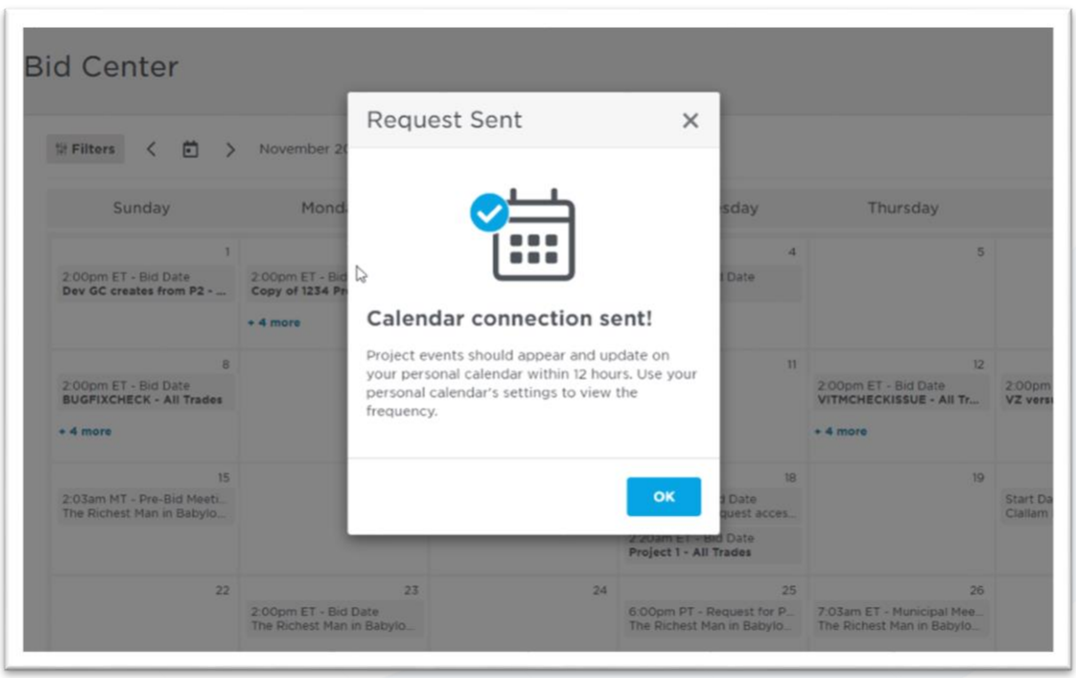
Calendar Sync button is added in the top right corner.
Current filter selection on the left side will be used for sync.



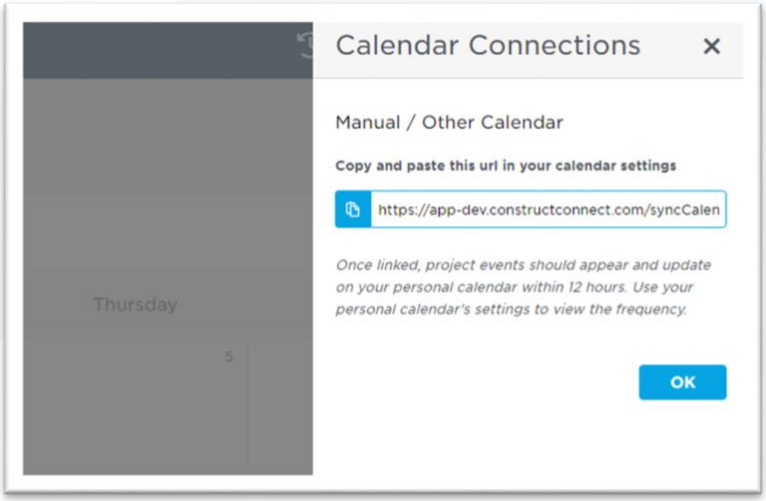
Sync options displayed after clicking on Calendar Sync button



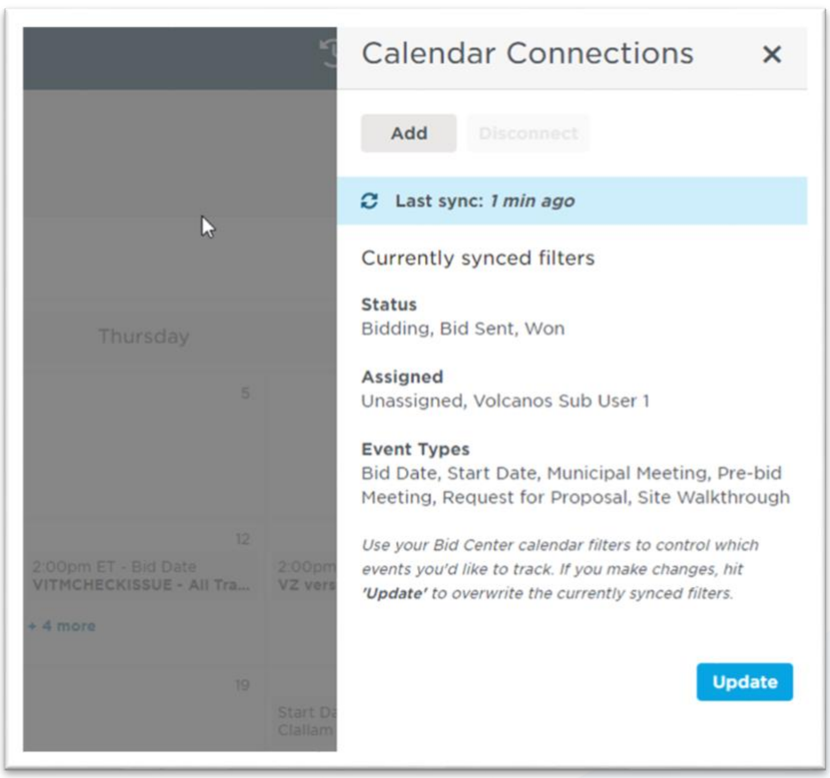
After clicking on any of the dedicated sync buttons the system will send request to the chosen external calendar in a new browser tab and open Request Sent pop-up in current tab



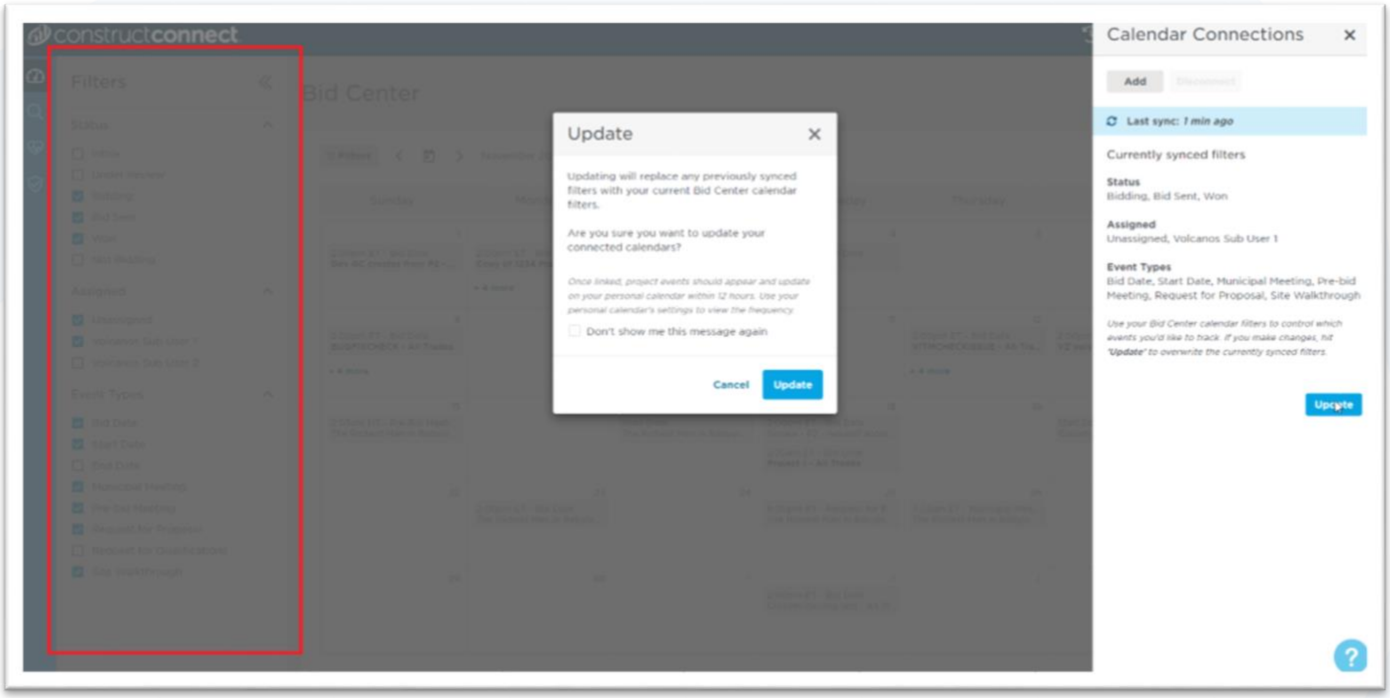
Alternatively, the user can use the copy calendar link to manually sync an external calendar



After calendar sync is set clicking on Calendar Sync button opens page with Last Sync Date, Currently synced filters, and options to update synced filters and add another external calendar. Last Sync Date is the timestamp of the last request received from an external calendar, including calendars synced via Manual link.



During Update currently synced filters will be replaced by newly selected filters on the left. External calendar will receive this new event set at the next sync.



Project Detail Page - View Documents button changes to View/Download Documents

- ✓ **Value:** This improves visibility for users who are scanning the page looking for the word "download" as their mission is to download the project documents

Bid Center Quality Improvements

- Custom Project Detail Page: multiple User Interface issues related to responsiveness have been addressed
- When confirming a project that you forwarded to Bid Center you should now see the Bid Date Time if it was included in the email.
- Bid Center: multiple User Interface updates to improve experience when viewing on a tablet or phone.
- ITB Project Detail Page: External Share has been disabled for Projects created by Accounts with disabled Sharing Permission
- Share Modal Responsiveness: now the header & footer are sticky to improve usability
- Share Modal Responsiveness: now input fields have proper look at sizes below 760
- Project Detail Page View History: creating/updating a project now produces a cleaner log view

PROJECT INTELLIGENCE

Contact Display

- Only display contacts on projects and companies when the content team has entered the role.
  - ✓ **Value:** Ensures that users only see accurate data on project and company detail pages.
  - ✓ **Value:** Increases user trust in our data by only displaying complete roles on product and company detail pages.
- Created By name changes to reflect the name a user currently has entered in You and Your Information.
  - ✓ **Value:** Users can accurately track who has created a note even when someone changes their name in the application.
  - ✓ **Value:** There will be no confusion if an account is repurposed for another user.

Search Update

- Search now accepts all special quote characters.
  - ✓ **Value:** Decrease customer confusion if a search string with special quote characters is copied and pasted.
  - ✓ **Value:** Display results for users no matter what types of quote character they use.

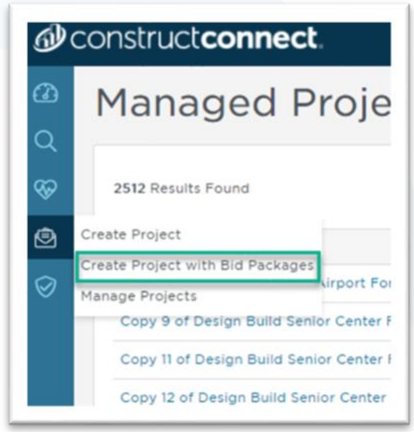
Predict Preferences & Notifications

- Remove redundant building use from Predict Preferences page.
  - ✓ **Value:** Ensure that data displayed in Predict Preferences are valid and accurate.
- Users only receive a single notification when they are invited to an ITB.
  - ✓ **Value:** Eliminates a redundant system email notification that was added.
  - ✓ **Value:** Users only receive one email reducing spam and ensuring only essential emails are sent to users.

Project Intelligence Quality Improvements

- Duplicated bidder information is no longer displaying on projects.
- My Value and Internal ID fields accept empty strings for fields.
- Fix placement of View/Download Documents button on PDP on smaller screen views.
- Package specific data is properly indexed and searchable.
- Empty addendum folders are removed from project documents on a regular basis.
- Johnson county now included in Missouri Plus subscription.

BID MANAGEMENT



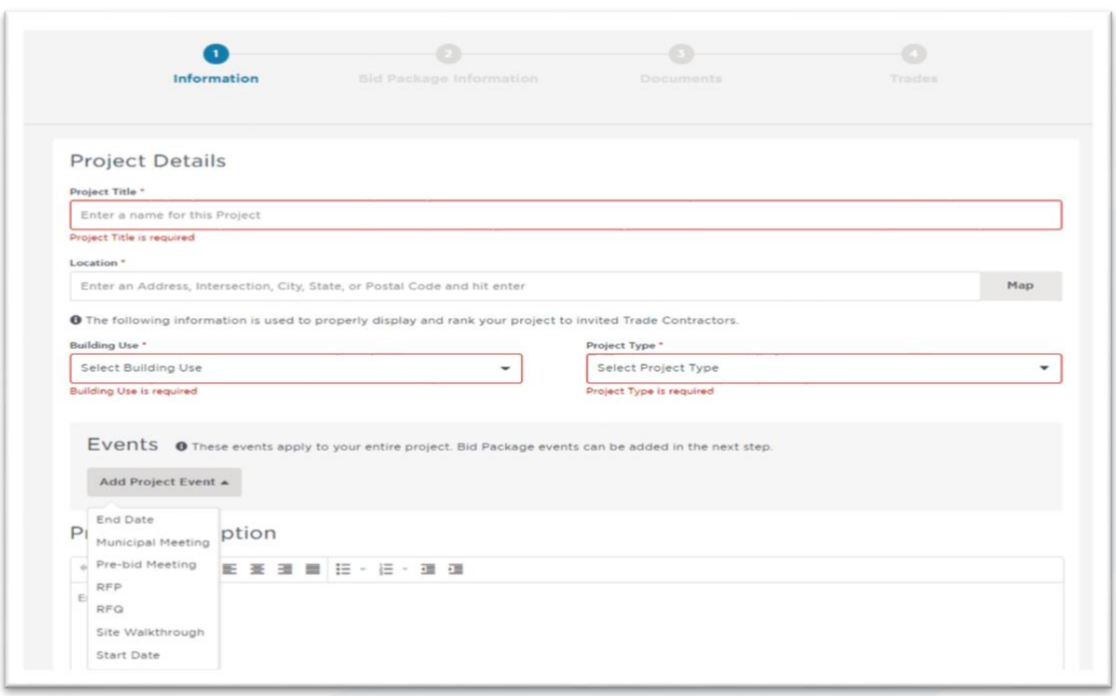
Create a Project with Bid Packages

- There is a new entry point for you to create a project AND bid packages in the same workflow.

The new design provides you with a step-by-step workflow to create a new Project, add detailed information and events to the Project and create multiple Bid Packages with their own details under the Project.

Step 1 – Add Project Information

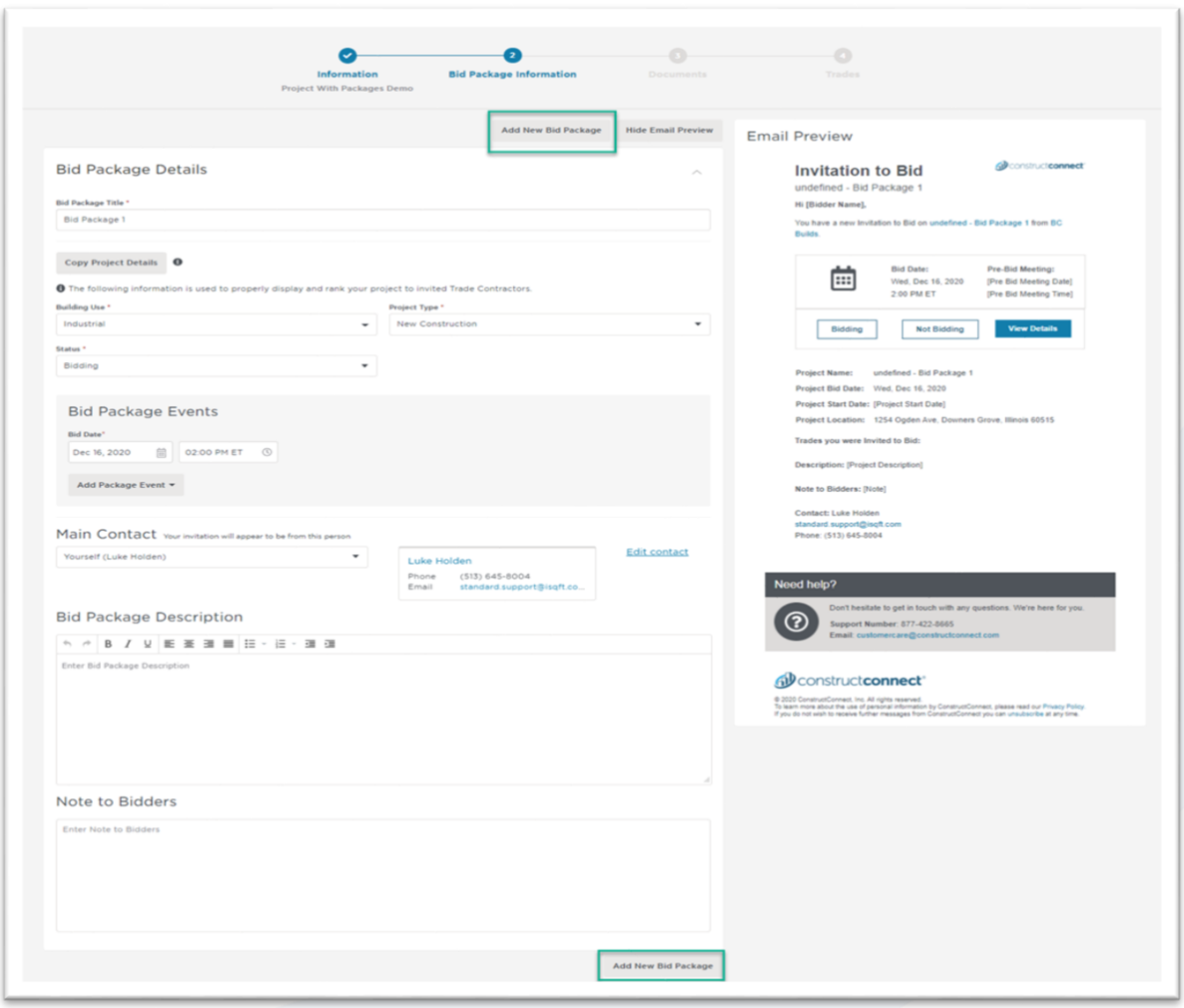
- You are now able to enter your high-level project information that will apply to all Bid packages
  - Events are related to the project as a whole and include:
    - Start Date (There will be a separate Start Date for each Bid Package)
    - End Date (There will be a separate End Date for each Bid Package)
    - Municipal Meetings
    - Pre-Bid Meetings
    - RFP
    - RFQ
    - Site Walkthrough
- The Project Description is separate from any Bid Package Descriptions and will not be visible to your Bidders.
- Project Title, Building Use and Project Type are all set at the Project level and independent of all Bid Packages.



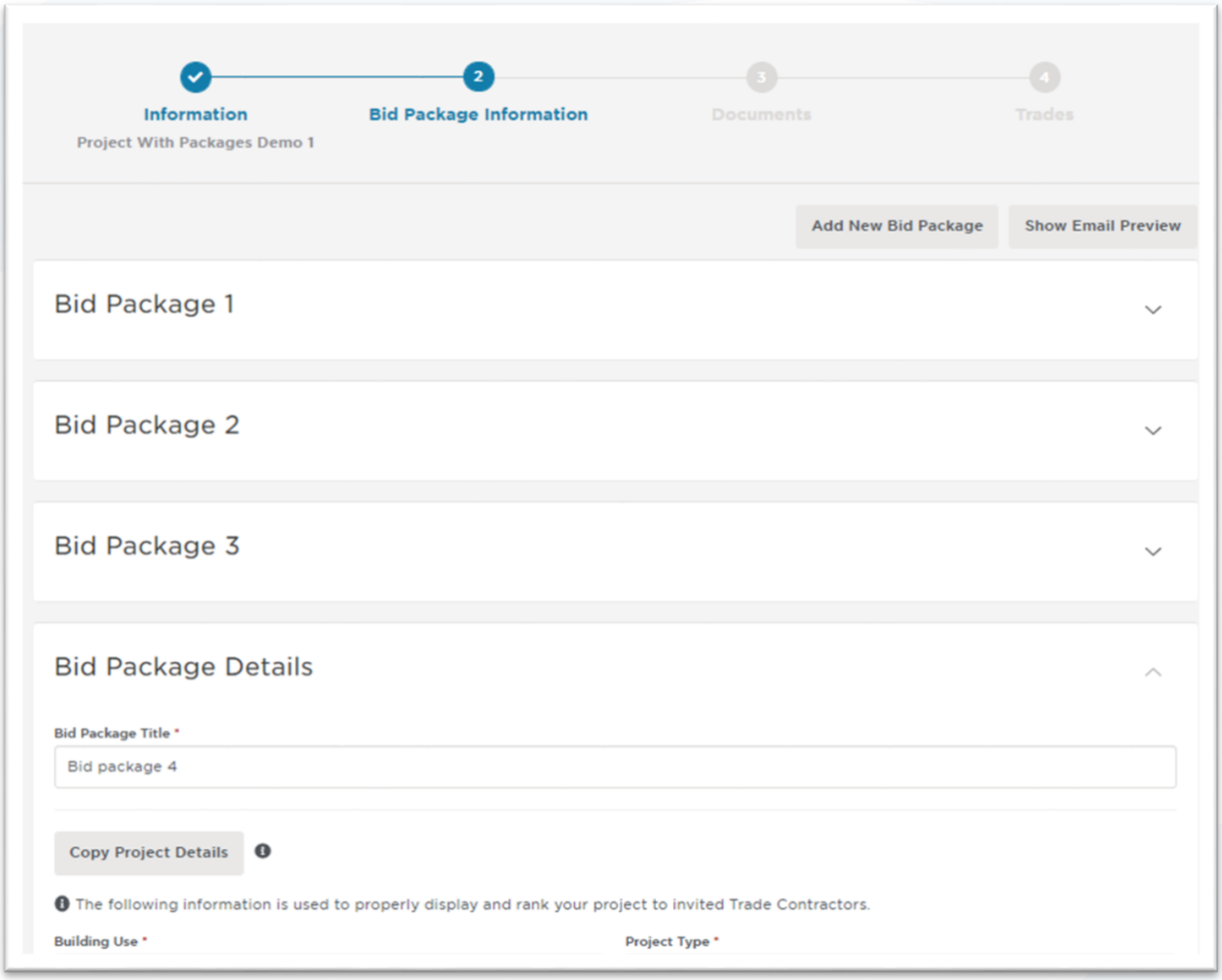
Step 2 – Add Bid Packages

- In the second step of the Create Project with Packages process you can add as many Bid Packages as needed along with Bid Package specific details that are independent of the Project details.
- You can easily add a Bid Package whether you are at the top of the page or at the bottom of the page, decreasing any scrolling.
- To decrease complexity, you can copy Project Details including:
    - Building Use
    - Project Type
    - Status
    - Bid package Events are specific to each Bid Package.
    - These include:
        - Start Date
        - Municipal Meeting
        - Pre-bid Meeting
        - End Date

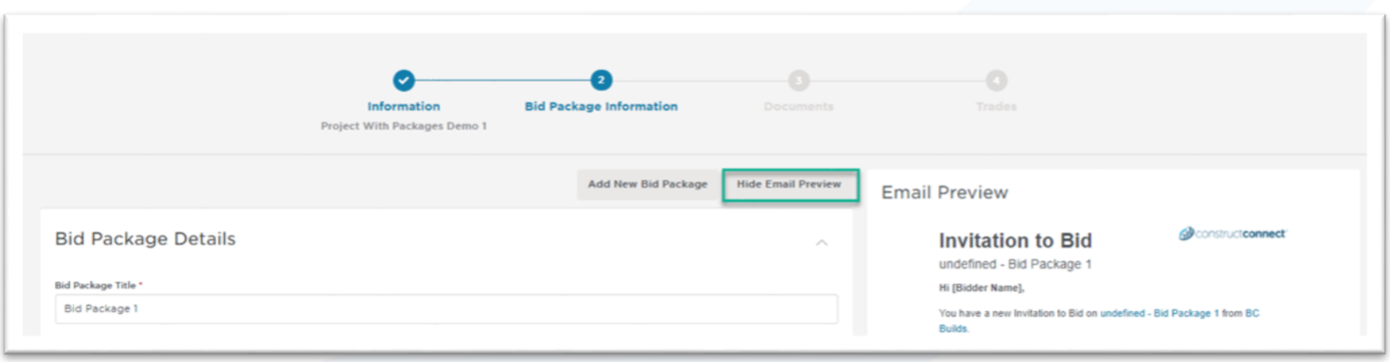
Bid package Description and Note to Bidders are specific to the Bid Package and are what Bidders will see on their invite.



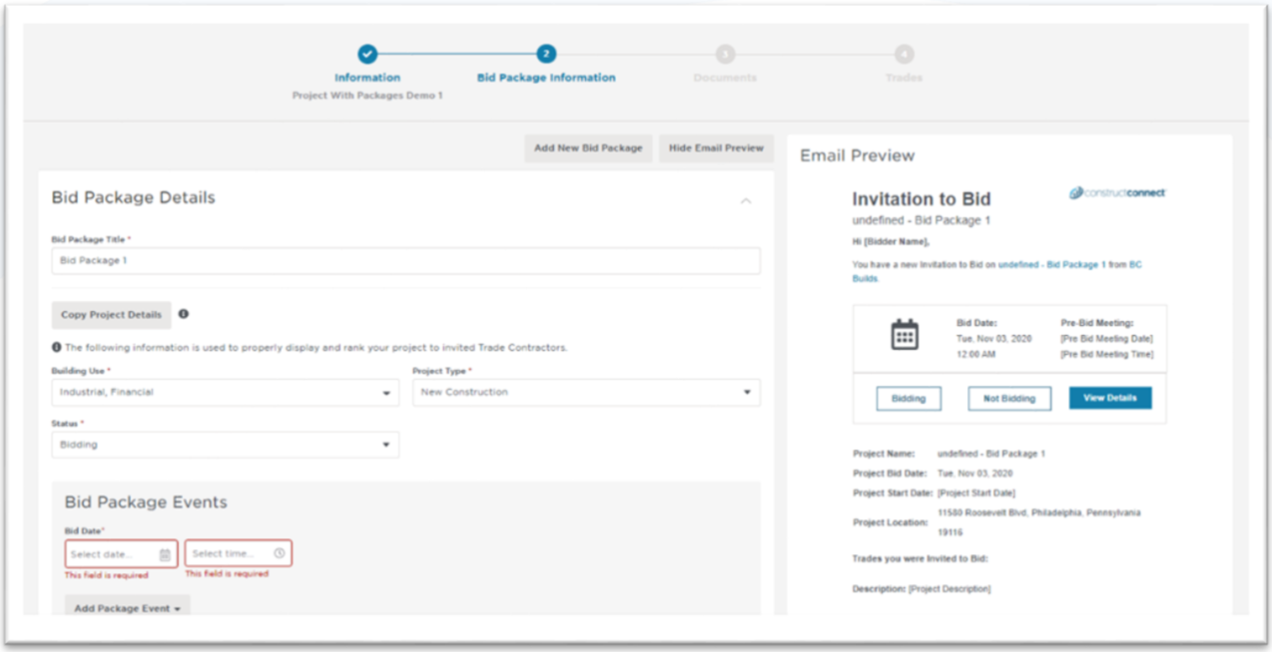
- When multiple Bid Packages are created, they will display on screen in the order they were created. This will be persisted throughout the workflow, so you are able to track your changes more easily.



- When a Bid Package is selected, the corresponding Email Preview will be displayed. This preview can also be hidden for a cleaner work area.

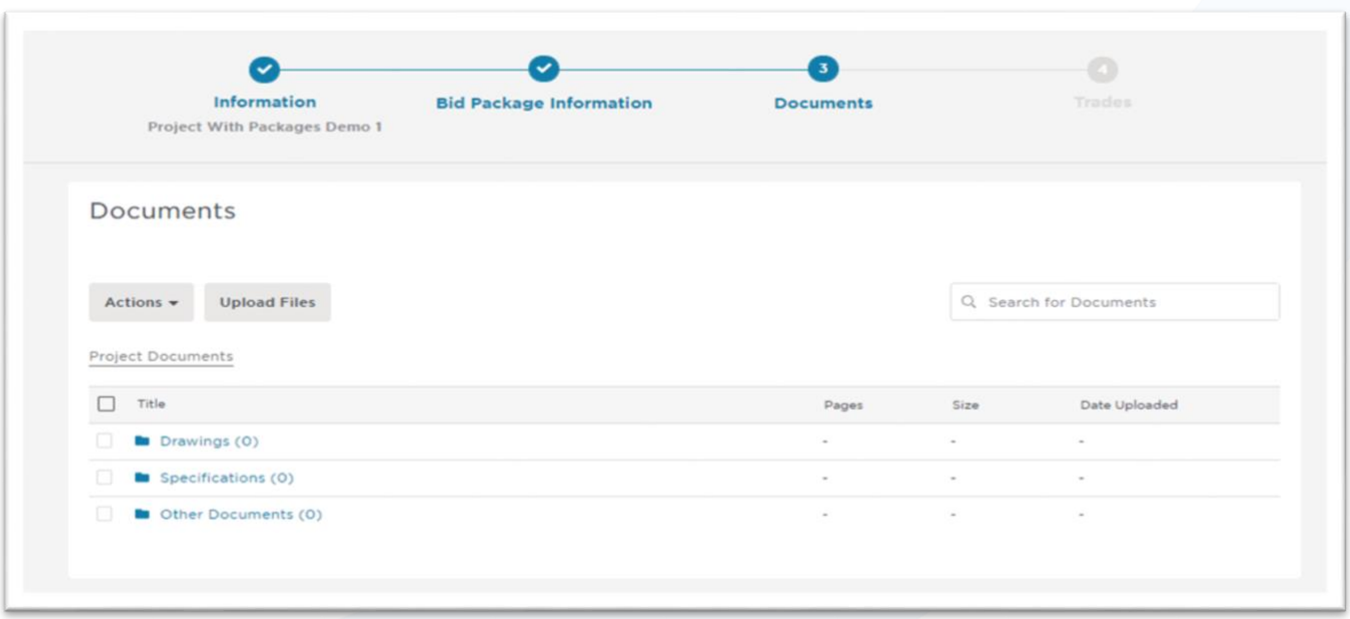


- If required information is missing in one of the created Bid Packages, an error will display and the Bid Package that is missing data will be opened so you can easily find where information is needed.



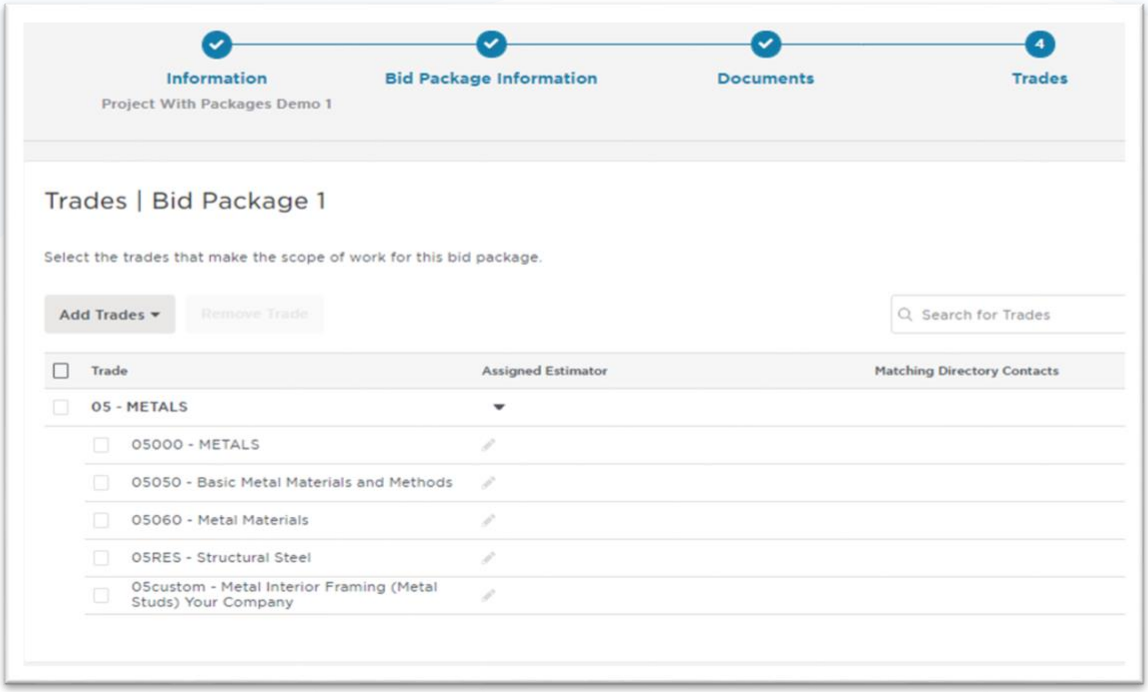
Step 3 – Upload Documents

- The document workflow in the Create Bid Package workflow has stayed the same.
- All documents added will be available to all Bid Packages in the project.



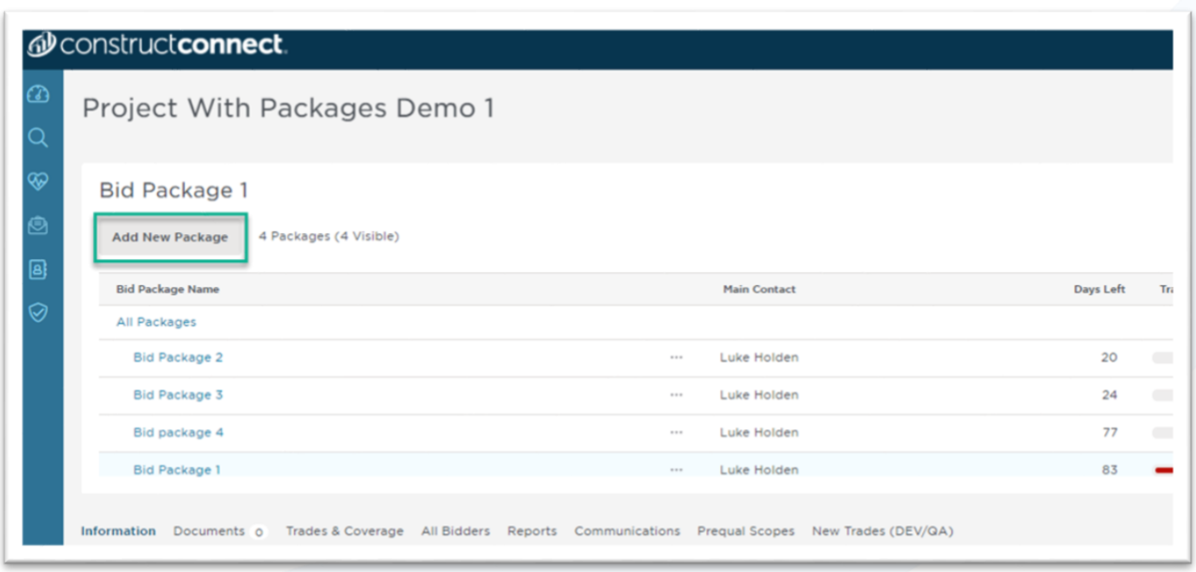
Step 4 – Add Trades

- Trades can be added from a list or trade template for each package.
- Only the Bid Package you are working on will be expanded. This will make the workflow easier to read and follow.

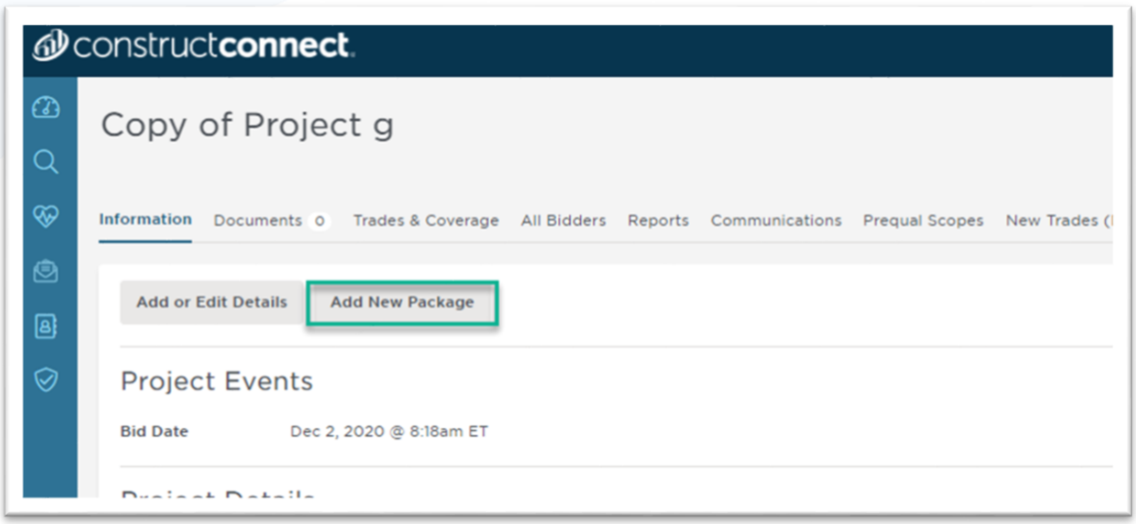


Create & Add a Bid Packages

- There is now a way you can add additional Bid Packages in an *existing* Project by using the "Add New Package" button in the Bid Package drawer.



- This workflow is identical to the Create Project with Bid Packages workflow except you will not need to enter any of the Project information.
- You can also add a Bid Package to a Project that does not have any Bid Packages.
- This button can be found right above the Project Details on the Information Tab.
- When adding Bid Packages to a Project, at least two Bid Packages need to be created.



Quality Improvements

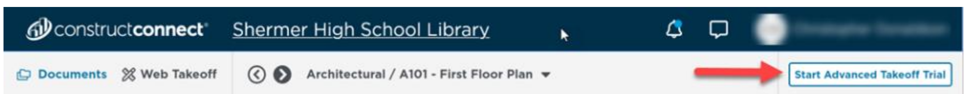
- Suggested Bidders no longer include Bidders who have not logged in for longer than 6 months
- Errors with document page counts in P2 resulting in the inability to view some documents that have not been formatted has been resolved
- Trade code mapping between different (1996, 2004 and 2016) Master Format type, so that when a CCBM user copies a project from iSqFt project Leads or CCPI it brings more relevant trade codes.
- Generated a list of users who sets too many trades and share with C4L colleagues so that their profiles are set “not to do network promotion” and send Pendo notifications informing them so and advising to clean their profile. This will be a repetitive task from now on, once every two months.
- API users can successfully get list of companies, even if their database has some duplicate custom fields in their directory database.
- iSqFt PreQual application performance has been significantly improved as it only loads the selected columns and doesn’t process all other unselected columns.

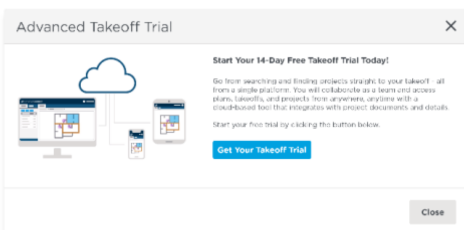
DOCUMENT VIEWER & WEB TAKEOFF

ConstructConnect Takeoff Self-Initiated Trial

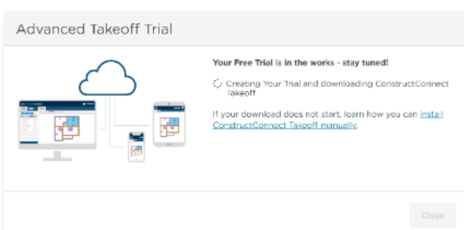
- Beginning with the November 2020 release, prospects and existing customers will be able to start a 14-day trial version of ConstructConnect Takeoff (CCTO) from Document Viewer (DV) and Web Takeoff (WTO).
- Both Windows and Mac users can download the trial. Mac users will be reminded they need a Windows emulator, such as Bootcamp or Parallels, to run CCTO.
- For a user to initiate a new trial, the project must have plans that are less than 180 days old.
- The trial will last for 14 days.

From DV or WTO, click the “Start Advanced Takeoff Trial” button and then click “Get Your Takeoff Trial”.





The trial will begin downloading. If the download doesn’t start, the provided link has instructions for installing ConstructConnect Takeoff manually.

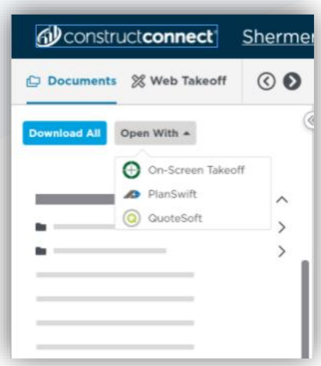


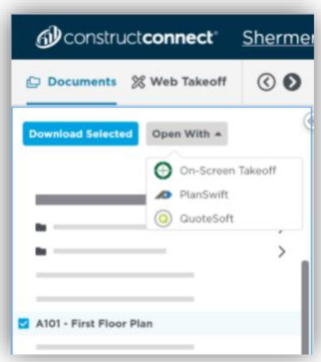
When the download is finished, find the installer and double-click it. The last step is to log in using your ConstructConnect credentials. If you have questions, call Customer Care at 866-215-6763 or email customercare@constructconnect.com.

Document Viewer Actions Dropdown Replaced

- Users can now navigate more efficiently through DV with the improved action buttons.
- Users now have two buttons instead of the Actions dropdown.
- The download button is dynamic depending on what the user has selected the button will display either “Download All” or “Download Selected.”

- The “Open With” dropdown contains three options allowing users to choose which classic Takeoff program they wish to use to open the plan set. (Note: Currently users can send their plans to PlanSwift. Integrations with On-Screen Takeoff and QuoteSoft are coming soon.)





Quality Improvements

- Fixed an issue that caused Document Viewer/Web Takeoff to crash when the notification section was accessed from Document Viewer.
- Fixed an issue that caused Web Takeoff to crash when a custom scale was set.