RELEASE NOTES

Version 2021.5.0 May 13, 2021

INTRODUCTION

This document describes the features included in version 2021.5 .0 release of the ConstructConnect Platform.

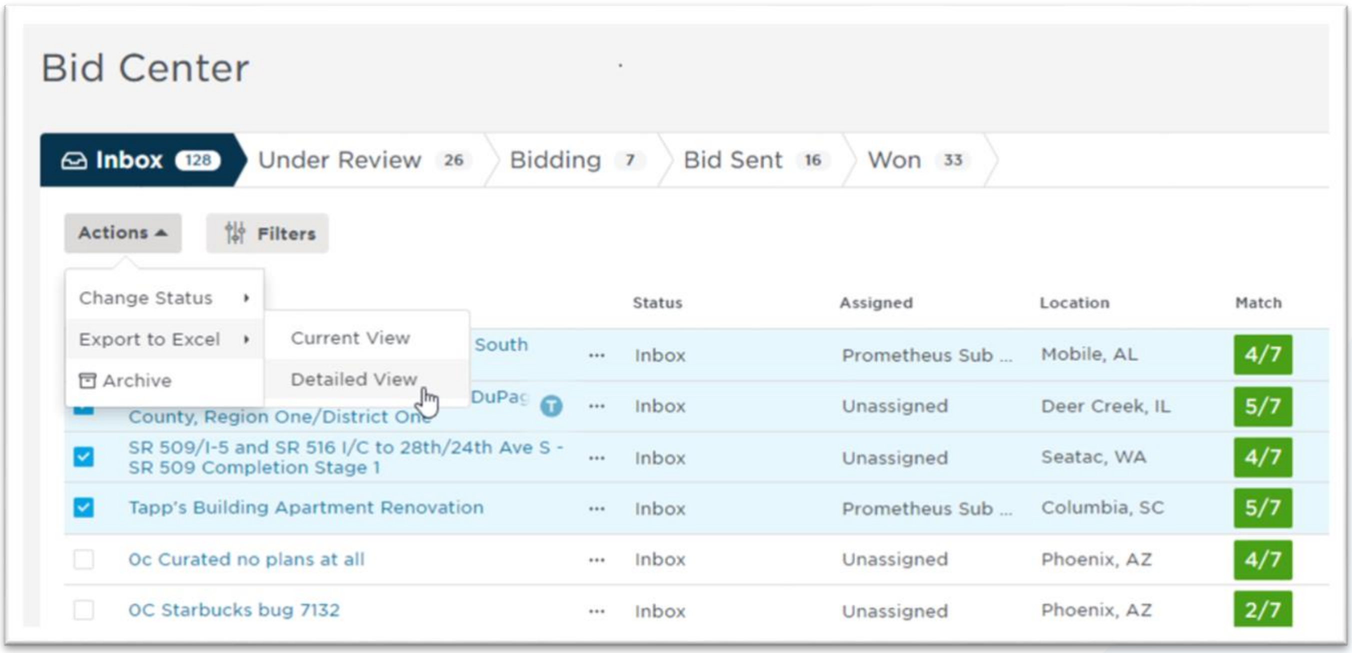
CONSTRUCTCONNECT PLATFORM

BID CENTER

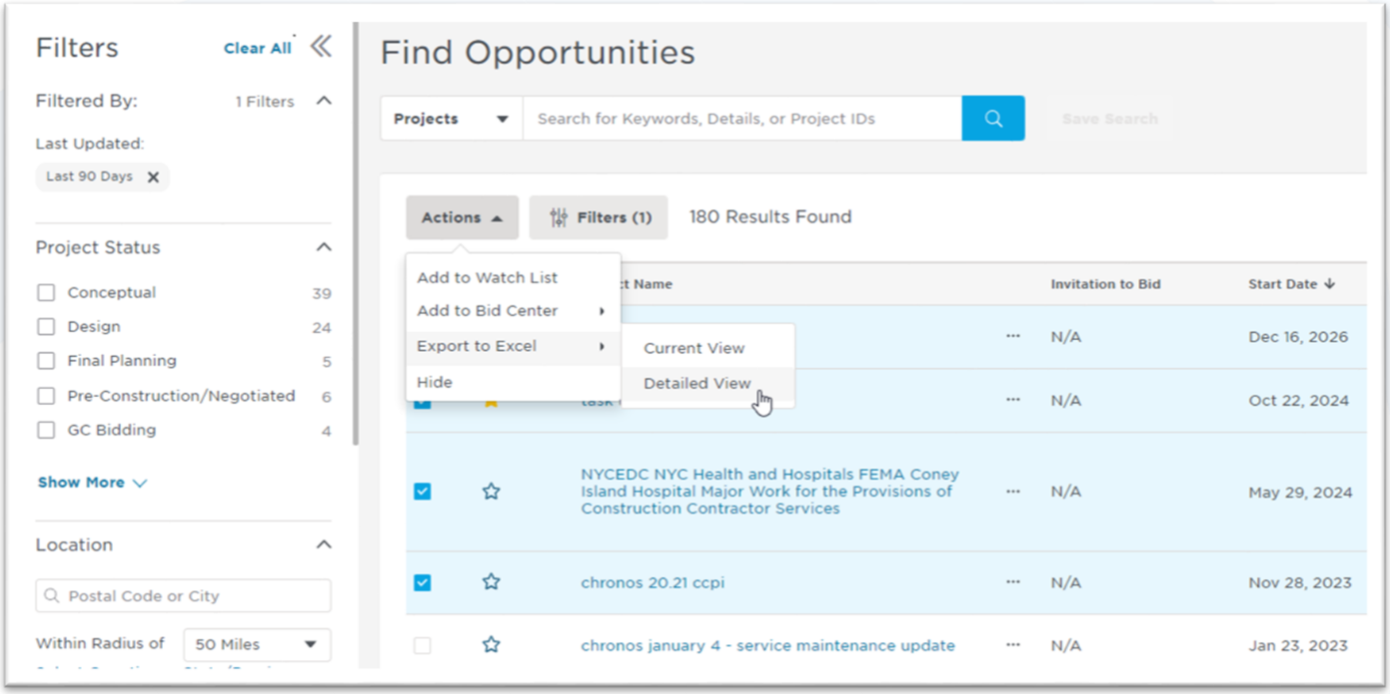
Excel export of project lists in Detailed View is now available on grid views

- ✓ **Value**: Users can now export project lists with detailed project information in the Excel format.
- ✓ **Value**: Project information includes project parameters and project contacts.
- ✓ **Value**: Project contacts include Bidders list where applicable
- ✓ **Value**: Data is represented on separate sheets for comfortable data management and easy upload to CRMs
- ✓ **Value**: Exports are available on the Bid Center grid, Search, and Watch List.
- ✓ **Value**: Users are notified when the export file is ready

Bid Center: Excel Export of Detailed View



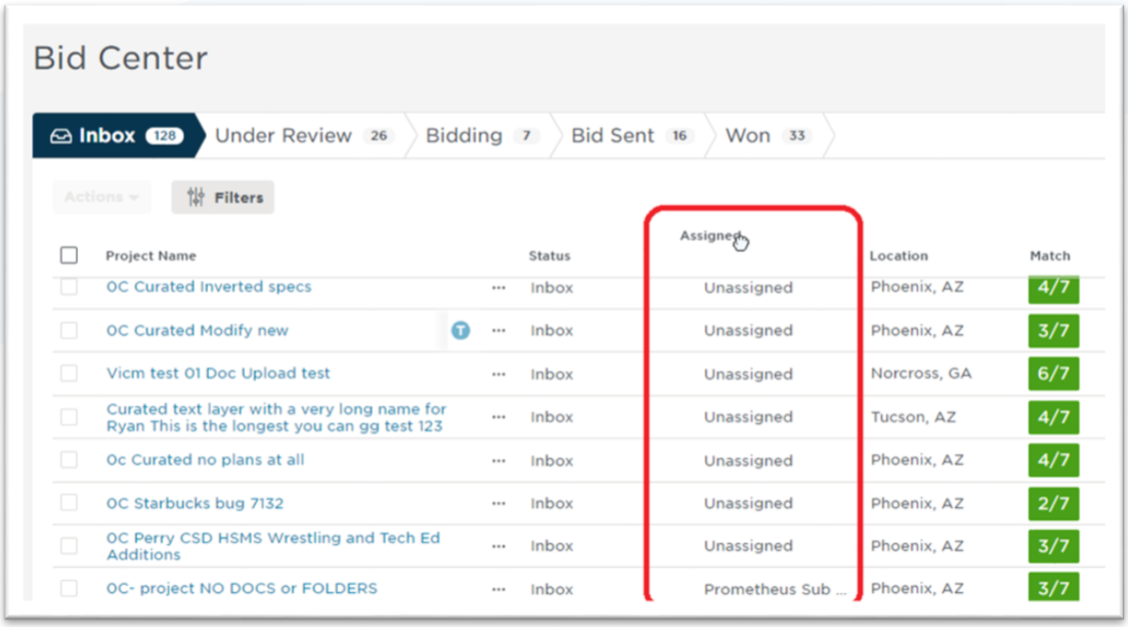
Search & Watch List: Excel Export of Detailed View



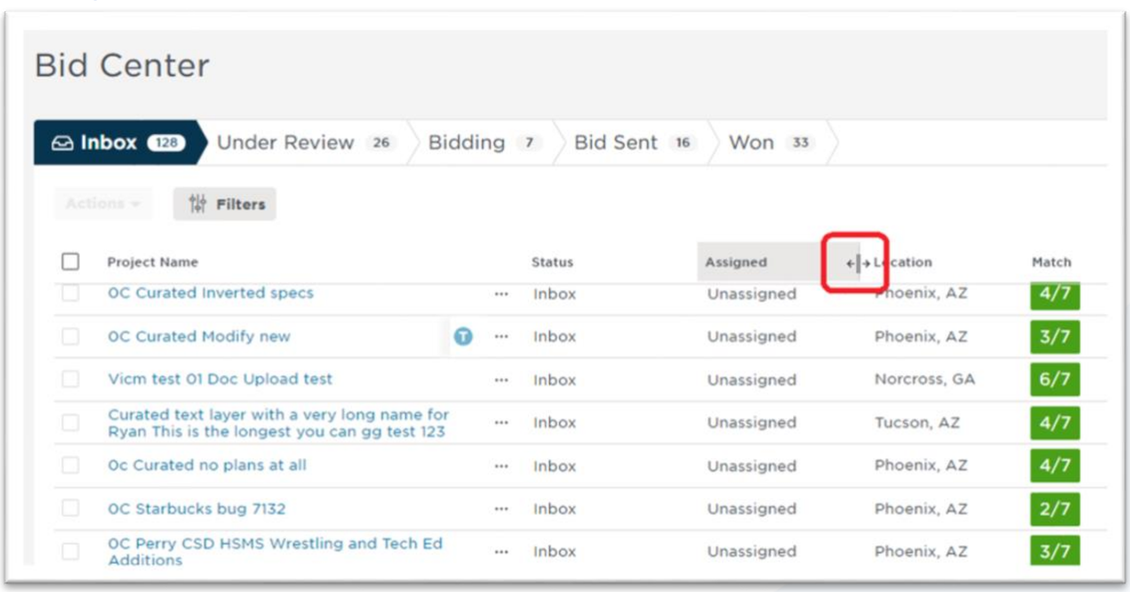
Grid Design Update

- ✓ **<u>Value</u>**: Users can now order all columns by clicking on the column headers and dragging them to the desired place
- ✓ **<u>Value</u>**: Users can now resize all columns by clicking on the border of the column headers and dragging it to the desired size
- ✓ **<u>Value</u>**: The grid now has improved pagination with number of results per page and currently displayed range so the user can now easily see where they are
- ✓ **<u>Value</u>**: The header and footer are sticky to ease scrolling and data operations
- ✓ **<u>Value</u>**: Column width and order set by the user are remembered and loaded next time the user accesses the Bid Center
- ✓ **<u>Value</u>**: Takeoff workflow has been simplified and improved for mobile devices

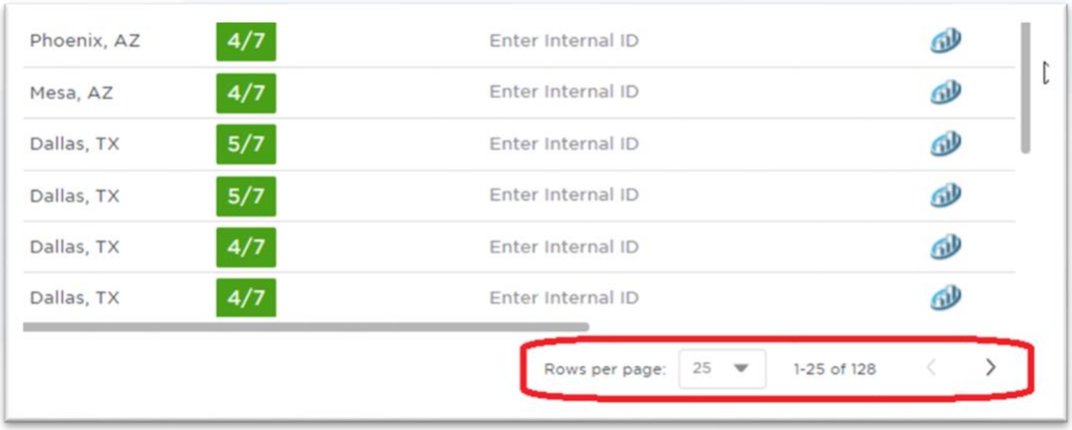
Dragging columns to reorder the view



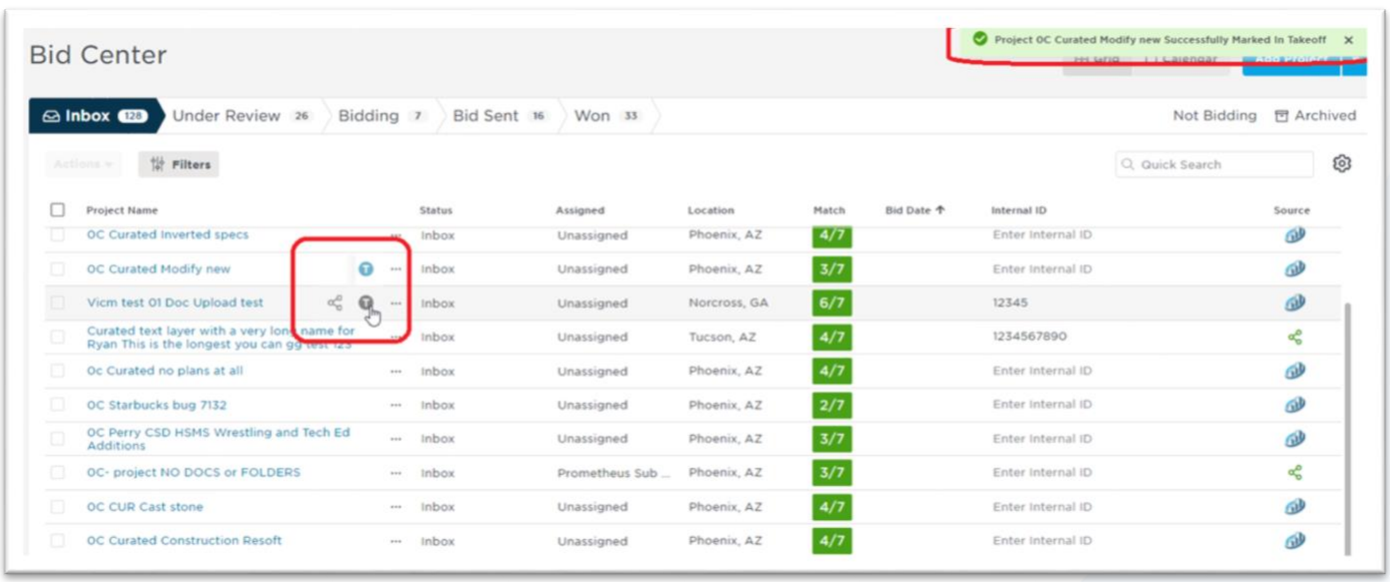
Resizing Columns



Updated Pagination



Updated Marking as Takeoff Workflow



PDF Export from Project Detail Page

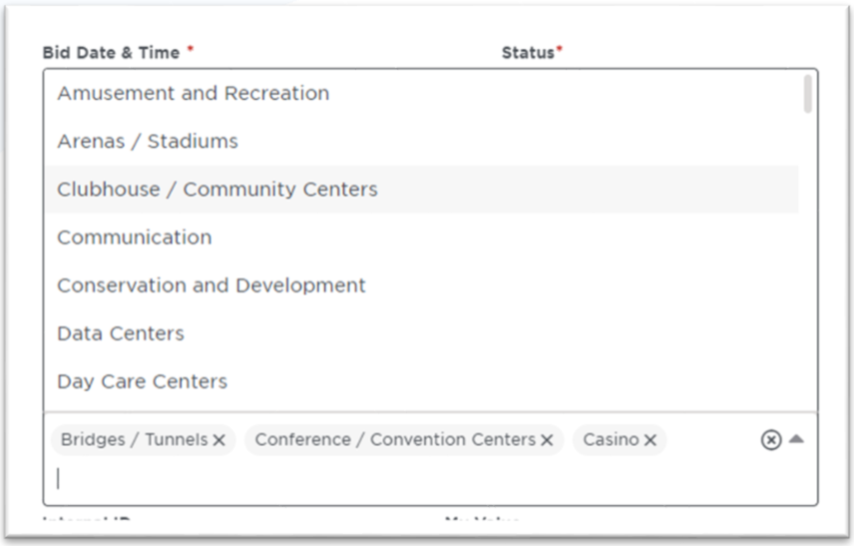
- ✓ **<u>Value</u>:** PDF export has been added for custom projects
- ✓ **<u>Value</u>:** Issues with PDF export for Invitation to Bid projects have been resolved

Mobile App: Display Bid Center fields on Project Detail Page

- ✓ **<u>Value</u>:** Users can now see and edit Bid Center specific fields such as Assigned, My Value, and Internal ID

Update to Building Use Selector

- ✓ **Value:** Building Use selections are always visible as you make changes.
- ✓ **Value:** Building Use options are now in alphabetical order to make them easy to find.
- ✓ **Value:** Building Use options are searchable.



Bid Center Quality Improvements

- CSV Export from Search & Watch List is being retired as a better Excel export alternative is now available.
- Source column tooltip now shows proper sender info for all ITB (Invitation to Bid) projects.
- Project Detail Page (PDP) Location field is now only updated upon successful save.
- Multiple responsiveness related issues have been resolved.

PROJECT INTELLIGENCE

Enable User Management Portal access for all users with this permission.

- ✓ **Value:** Administrators can allow other users to manage users and licenses
- ✓ **Value:** Gives more control over what actions users can perform.

Users with a Takeoff license will automatically be given access to Bid Center.

- ✓ **Value:** A user with a Takeoff license can log into Bid Center.
- ✓ **Value:** Creates a smooth transition between Takeoff and Bid Center.
- ✓ **Value:** Takeoff users can also access their projects via Bid Center.

Display polygon highlighting on predict preferences service area map.

- ✓ **Value:** Users can clearly see what areas they are selecting for their service area.

Project Intelligence Quality Improvements

- Project Type filter values have been cleaned up.
- Documents are updated on a project in a timely manner.
- Start Takeoff Trial button displays the proper text depending on whether or not a user currently has a Takeoff license or not.
- Search icon displays properly in the search flyout menu for 1080px width.
- Contacts section highlighting on the project details page works properly at 1280px and 1920px width.
- Proper tooltips display on the project details page when there are no documents available for a project.
- Background is white on the project and company results grid in mobile view.
- Row icons and row menu display properly for company and project search results grid.
- Role and Company Name display properly on the contacts section of the project details page.

BID MANAGEMENT & RISK MANAGEMENT

Bid Packages – Assign Estimators to Trades

- Assign estimators as trades are added upon creation of a project.
- New and intuitive "Assign Estimators" flyout that can be accessed from the Actions menu.
- Assigned Estimators are displayed upon hover of a trade which saves precious screen real-estate and provides the information only when you need it.

Value Prop: Now trades can be assigned to specific Estimators. This allows for better tracking and organization on larger projects. This new workflow will also alleviate the need to break a project up into Bid Packages, if Bid Packages were created to only separate trades into a specific Estimators responsibility.

Custom Roles and Permissions

- With this release, admins on ConstructConnect platform can assign specific permissions to a role to their internal users and through that can control what application-level permissions are given those users. An enhanced "User Management" page in our CCBM platform allows admins to assign or remove licenses or assign roles to users. Please see details in the following subsections.

Value Prop: Now multi-user account admins can ensure that the right people in their organization are not only entitled to right products but also the right features ; allowed to see and work on right kind of precon workflows; through Roles and Permissions feature. Also, it helps secure key financial, operational and safety data by limiting specific feature access to the necessary users only.

Prequalification Data in Bid Management

- If you are provisioned with Pre-Qualification (Risk Management) along Bid Management you can now see your subcontractor Pre-Qualification form section fields along with Pre-Qualification Status in your Trades and Coverage and All Bidders grids. To support this release has following enhancements:
    - Icon updates in iSqFt, CC Risk Management and CC Bid Management
    - The Prequal Status column has been added to the Trades and Coverage and the All Bidders tab

Value Prop: Users who are provisioned with CC Risk Management and CC Bid Management no longer need to navigate away from their Bid Management application to see Pre-Qualification status on the bidders within a project. And, the updated icons are more pleasing to the eye and allow for easy identification of Prequalification status throughout the Risk Management applications.

New Grid Design on Manage Forms

- Multiple updates to the table design have been released allowing you to customize the Manage Forms grid

> **Value Prop**: Users can now see the table in the view that works for them, with the columns sorted, arranged, and sized according to the user's preferences. This saves users time and increases their productivity. The settings are remembered and automatically applied the next time user loads the page.

Bid Management Quality Improvements

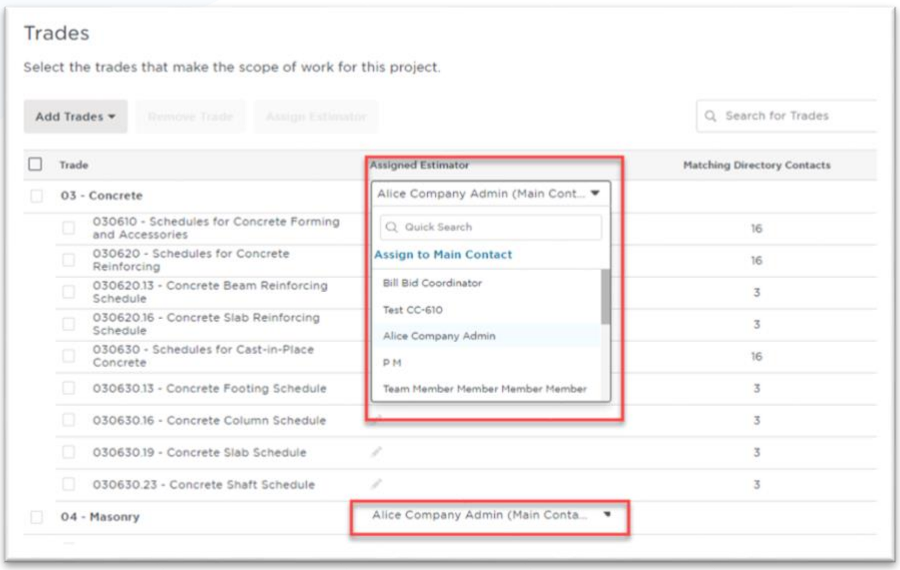
- Excel Export on Trades and Coverage will display a company's information in one line
  - Previously this was cut off at column M and then being split into two lines
- Cancel button is now working in the Publish to Procore screen
  - Previously you were not able to exit the "Publish to Procore" screen and return to your project
- If more than 75 emails are added to the "Add Bidders by Email" option, an on-screen error will display
  - Previously the bidders were not getting added and you would not be notified that they were not added.

Risk Management Quality Improvements

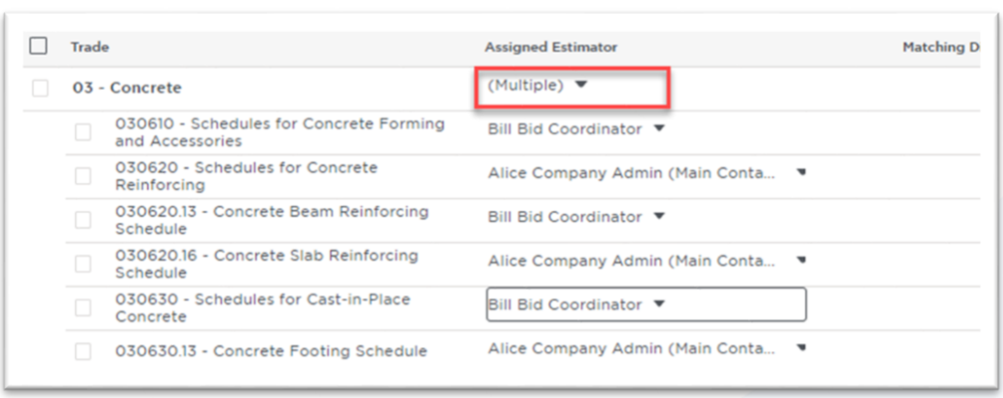
- Manage Forms Saved Search modal loading is improved by immediately closing the modal and providing a loading spinner on the Manage Forms page
  - Previously loading was confusing and duplicated by a save spinner on the save button and on the Manage Forms page once the modal closed.
- Manage Forms Save Search Modal now appears over the header so the whole modal is displayed at all times.
  - Previously top of the modal would be hidden behind the header if a large number of filters were applied and displayed in the "Applied Filters" field in the modal.
- Create Transmittal has been renamed to "Send Prequalification Notification" on the Manage Forms and Prequal Scopes pages.
- Public company account access to Prequal forms are now based on the contact the GC issues the form to
  - Previously access was automatically granted to every account in the private directory grouping

Assign Estimators to Trades Workflow

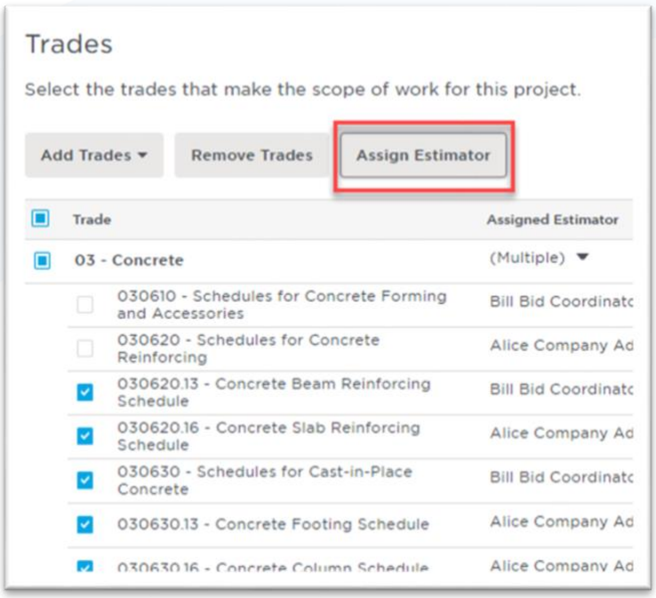
- During creation of a project or a project with bid packages, you are now able to assign estimators to individual trades by selecting an estimator from the drop down next to each trade.
- By default, all trades are assigned to the Main Contact.



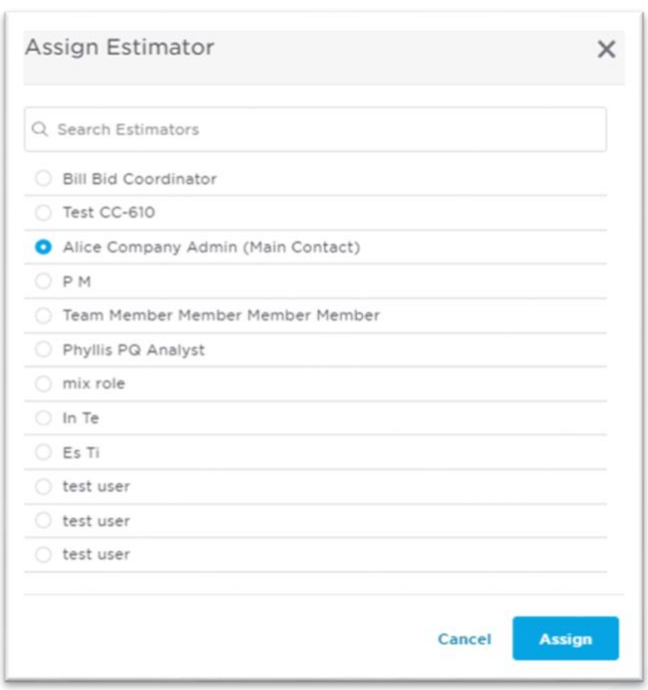
- If multiple trades within a division have different estimators, “Multiple” will appear in the Assigned Estimator field.



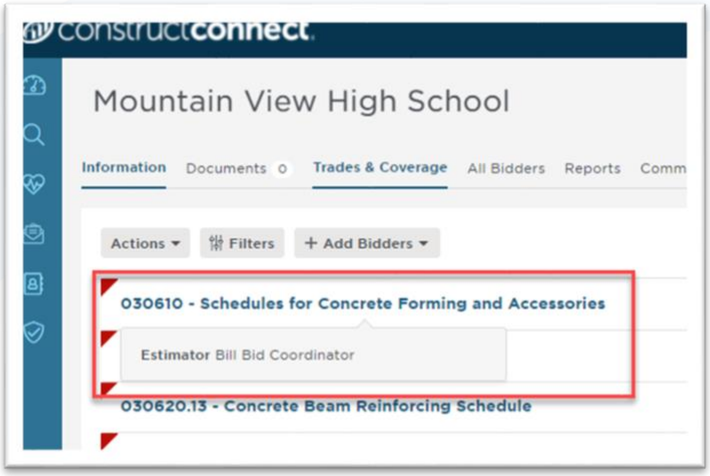
- Estimator” button and bulk assign an estimator



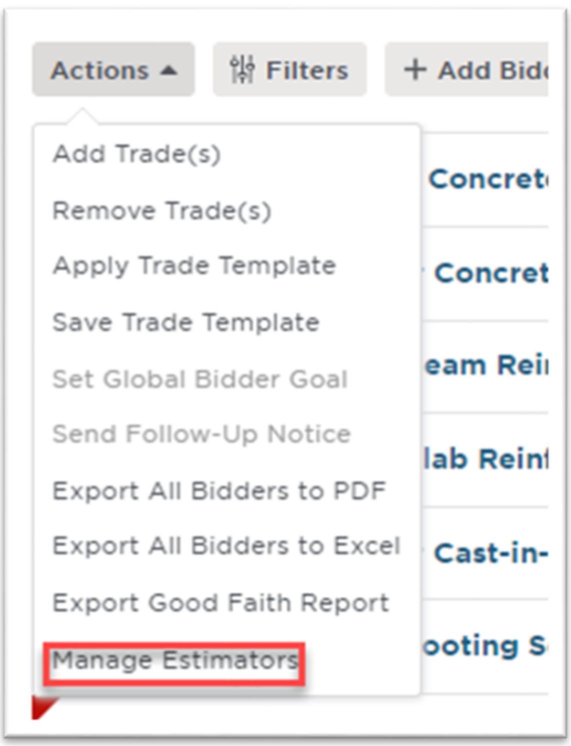
- Bulk Assign Estimator Modal –



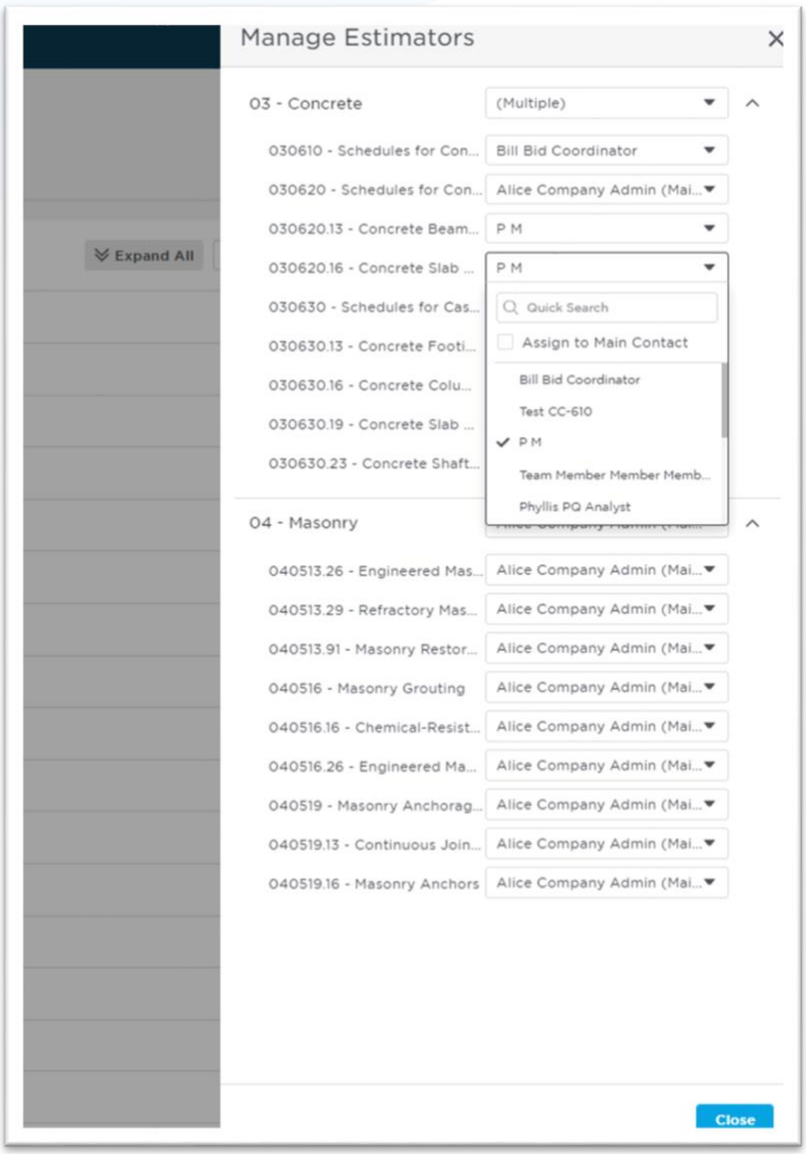
- displaying the assigned estimator.



- In a created project, if you would like to update the estimator assigned to a trade, you can select the "Manage Estimators" option in the Actions menu. This will open up a flyout where you can update the assignments.



- The workflow in the Manage Estimators flyout mirrors that of the workflow in the Create project. You can select an estimator from the drop down and assign them to the trades you would like them to handle.



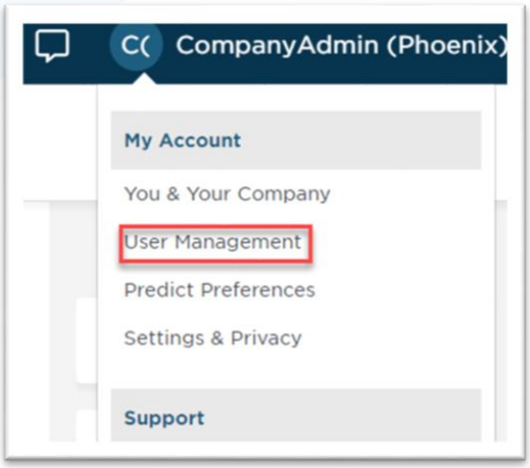
Notes:

- If a Main Contact has been updated to a user who is not a listed the “Assign to Main Contact” option will not be available as you are not able to assign a trade to a user who is not a listed estimator.
- If a Main Contact is updated in any way, the trades assigned to the previous Main contact(Estimator) will remain assigned to the original estimator.

Custom Roles and Permissions Workflow

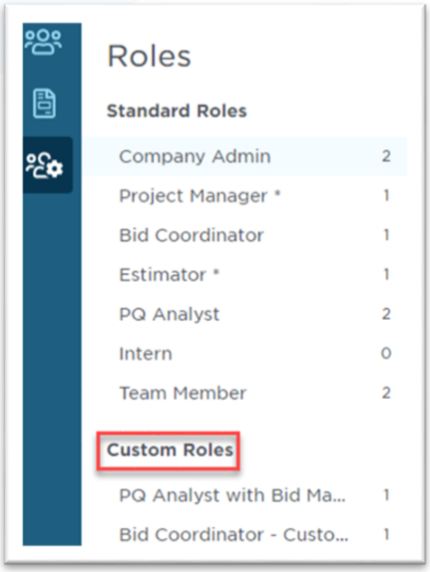
– As a Company Admin you will be able to manage application-level permissions for users in your company by assigning them a specific role and customizing permissions to that role.

- You will access this by clicking on your name in the upper right of the screen and selecting "User Management" in the drop down under "My Account"

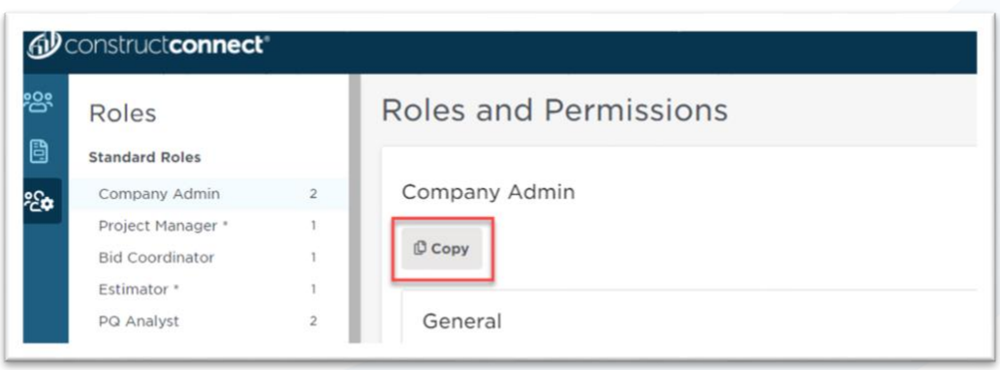


- Users within your company
  - This is the first selection in the left rail
    - Here you can:
      - Invite new users
      - View users in your company along with their Roles and License
        - This will include both standard and custom roles
        - You can change a role for a selected user in the drop down that is located within the Role column.

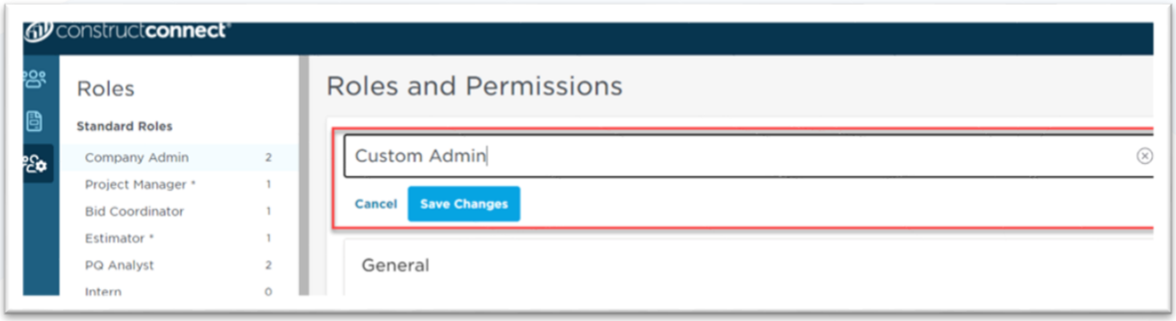
- When you click on the bottom icon on the left hand navigation, it presents you with a list of roles applicable for the entire ConstructConnect Platform
- There are two sets of Roles available:
    - A fixed set of standard or default roles that you can assign to your internal users.
    - All Custom Roles that you have created
- Each role also lists how many users are assigned a given role in your company.



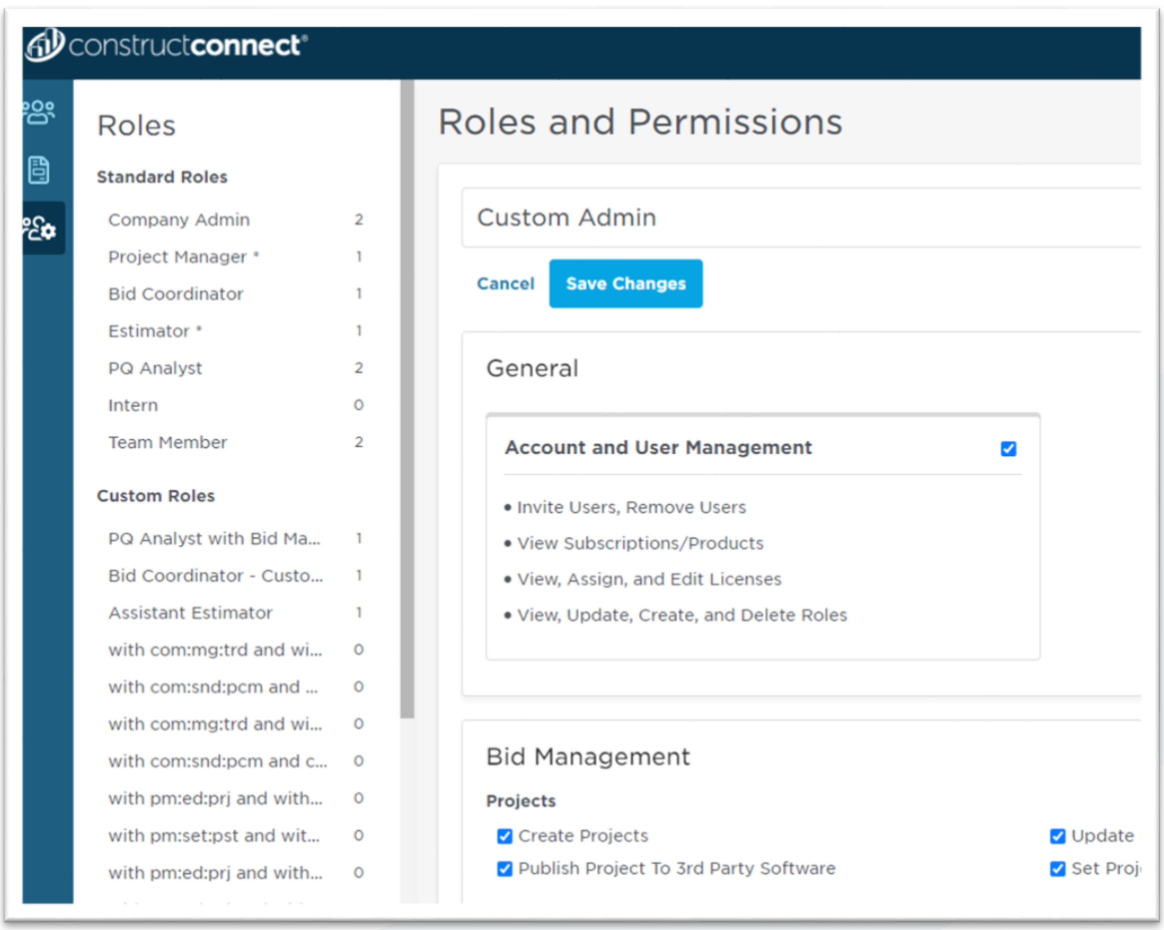
- When you select a role (Custom or Standard) on the left hand side, you can see permissions assigned for that role on the left hand pane.
- These permissions are broken down by product or workflow group, starting with "Company Admin Workflows" which will be available to all ConstructConnect Platform users.
- If your company has entitlements for Bid Management or Risk Management or Takeoff, each one of them shows up as separate permission set.
- You are now able to edit the Custom Roles permission set to match the needs of your company.
- Start by selecting to copy a role from the provided standard roles that closest match your needs



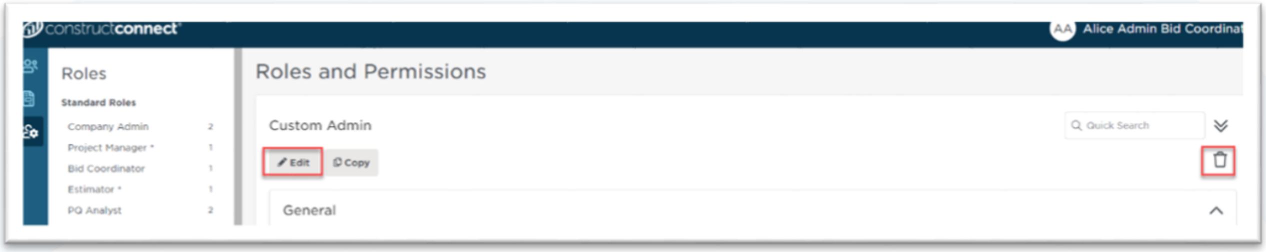
- Rename the role so you can track it



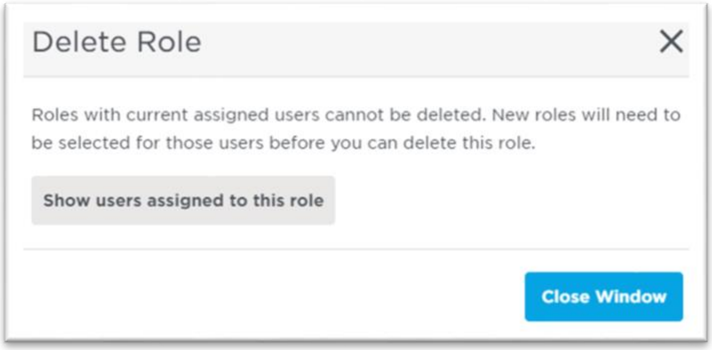
- Update the role with your desired permissions by clicking on the checkbox next to the permission, and save the changes
- After you have created the custom role you can return to the users page and assign this new role from the drop down in the “Role” column



- After creating a custom role, you are able to further edit the role if you need to make changes to it.



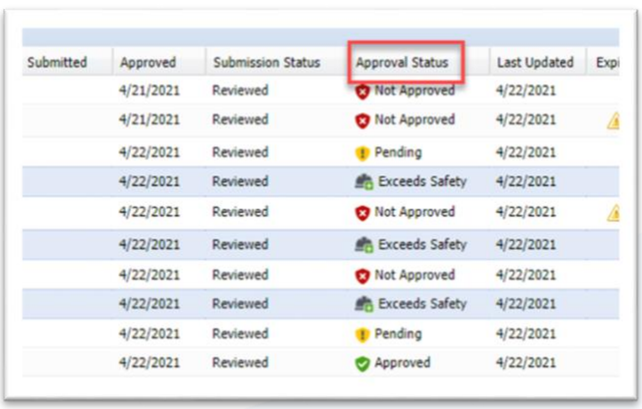
- If you decide you no longer need a role you are able to delete it.
- If you currently have users assigned to the role you will be directed to remove this role from the user and assign another role prior to deletion.



PreQualification Data in CCBM Workflow

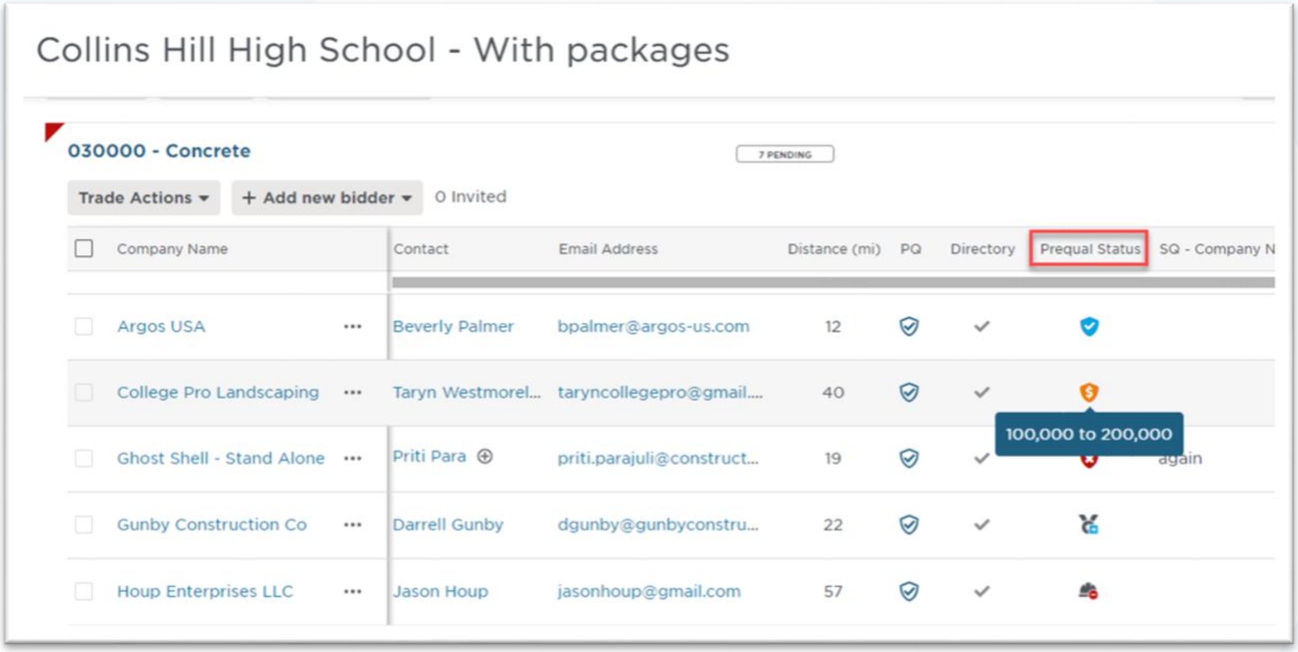
Approval Status Column

- If you are provisioned with Risk Management(Pre-Qual) you can now choose to see your sub-contractors Approval Status in the Trades and Coverage and All Bidders Grids.
- To view this new column, select it in the Standard tab of the Customize Columns flyout

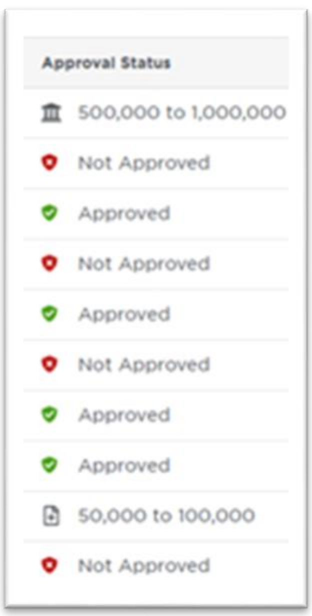


Updated Risk Management Icons

- Risk Management icons have been updated to a more visual pleasing design.
- The icons are mapped to your old icons and you will not see any changes other than a modern feel.
- CC Platform-



- P2 Platform



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- Columns can be resized by clicking on the border of the column headers and dragging it to the desired size
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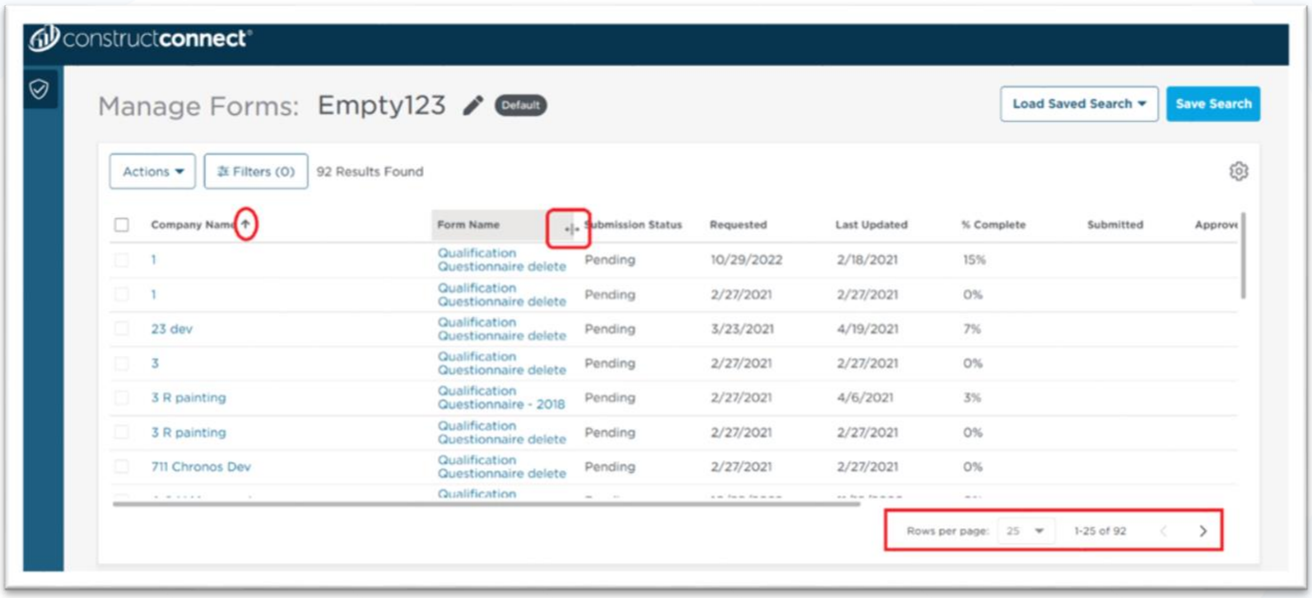
- Column width set by the user are remembered and loaded next time the user accesses the Manage Forms page



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