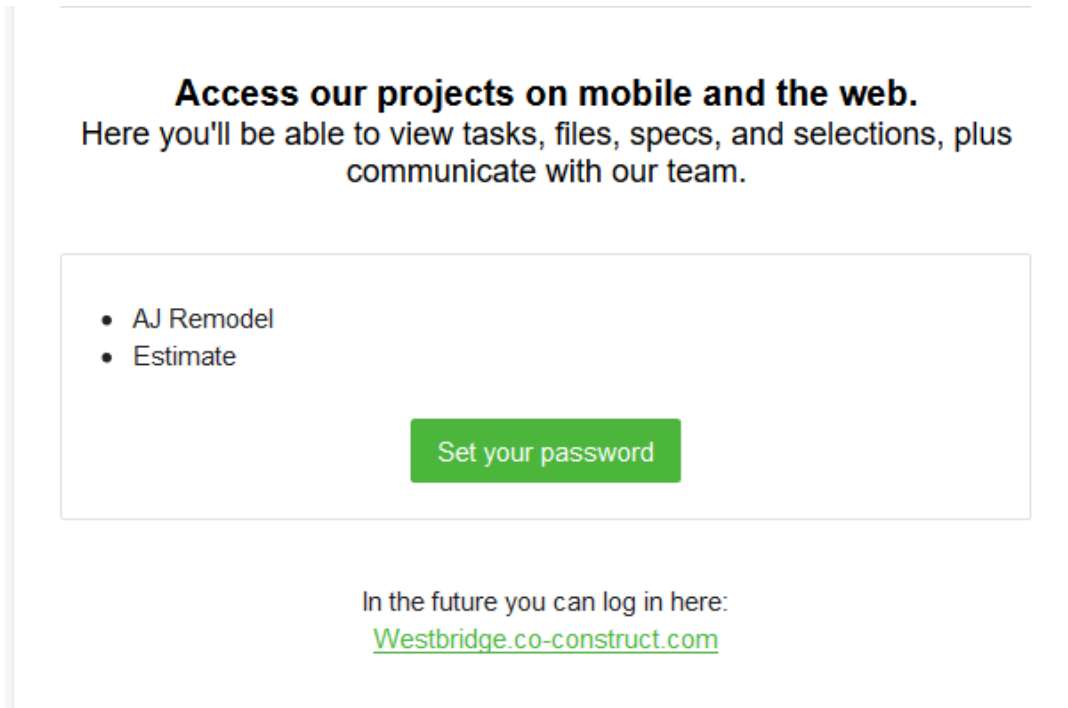


# Trade Partner Guide

## Welcome to our online system!

The first step to interacting with our online system is to set up your password. You'll receive an email titled "Welcome to our mobile and online system!"



When you receive this email:

- Click the green **"Set your password"** button. Create and confirm your new password – this will log you directly into the system.
- **Bookmark the URL** listed in the welcome email ("In the future you can log in here") to quickly access our site in the future.
- If you'd like to access our project info via your smartphone, **download the mobile app**. You can go into the Google Play or App store and search "CoConstruct". You'll log in with your email and the password you created above.

If you ever forget your password, just use the "Forgot Password" link from the log in screen on your computer or mobile app. You'll then be emailed a link to reset your password.

# Trade Partner Guide

## Main Menu

When you first log into the online system, you'll see your Main Menu. Start out by **watching the short welcome video** in the yellow box at the top of your screen. This will guide you through navigation of the system.

The screenshot shows the COCONSTRUCT Main Menu. At the top, there is a dark header with the COCONSTRUCT logo and links for 'Main Menu' and 'Log Out'. Below the header, the page title 'Main Menu' is displayed. A yellow box contains a 'Welcome to Co-construct.' message with a link to watch a 7-minute training video and a link to hide the notice. The main content area is divided into several sections: 'My Projects' (listing 'Amber Harlow Demo Homes' and 'AJ Remodel Estimate'), 'My Tasks' (with sub-sections: My Tasks, Selections, Change Orders, Files & Photos, Schedule), 'Project Info', and 'Unconfirmed Task Assignments' (stating 'You have no unconfirmed tasks.'). Below these sections is a 'My Tasks' table with columns for Task, Builder, Project, Attachments, Start, Finish, Other Assignees, Confirmation, and Comments. A single task is listed: 'Get quote for door' by 'Amber Harlow Demo Homes' for 'AJ Remodel' with an 'Attach File' attachment, starting on '6/15/2018' and having '0 comments'. The footer contains copyright information: 'Copyright 2005-2018 Co-construct, LLC. All rights reserved. Terms of use Privacy statement'.

This will include the list of projects that we've added you to.

Click on a project name to view the job address. From there, select the page of the project you're wanting to view:

- **My Tasks:** List of the specific tasks that you've been assigned to on the selected job
- **Selections:** View the project Specs & Selections including the relevant scope of work and decided selections that might affect your work.
- **Change Orders:** View change order documents approved by us and the client for relevant changes to the project scope. Be sure to verify the status of change orders before acting on any information there.
- **Files & Photos:** Access files or photos relevant to the job including plans, progress or selection photos.
- **Schedule:** Outline of the full job schedule to view the flow of work and tasks that might impact your schedule work. This will provide you a live view of the job progression to gauge where there might be delays.

## Bid Requests

When you receive a bid request through the system, you will be provided with the project name and address, scope of work and requested costs to bid as well as important instructions.

When you receive these requests, here's what you can do:

### Invitation to Bid: Windows

**Due Date**  
10/5/2018

**Will You Bid?**

Yes

No

**Project**  
Harlow Home Proposal

**Address**  
123 Ivy Road, Charlottesville, VA [view map](#)

**Bid Items (bid on each of these items)**

#### 6.01 Windows and Patio Doors

1. Windows and patio doors shall be double pained, low E, argon filled, Marvin Integrity with white exterior and prefinished white interior.
2. Sizes and styles specified on plan.
3. Windows to have SDL with no spacer bar in standard patterns as shown on plan.

**Original Budget**

1. Marvin window package (1 each)

**Original Budget**

2. Installation material (24 each)

**Original Budget**

3. Installation labor per window (24 each)

#### Instructions

Please see scope of work for items requested and bid appropriately. Provide cost for each bid line individually, not a lump sum.

Thank you!  
Westbridge Homes

#### Exclusions

Please include separate costs for the cost lines above.

#### Files

[Download Plan Room Files](#)

Reply to this email to ask questions or submit your bid. Attach any files.

- **Review the request** details including scope, cost details and notes.

- **Indicate your plan to submit a bid** (just click the “Yes” or “No” button at the top of the email).

- If you have any questions regarding the request just **reply to the email** to send those questions back to us.

- When you're ready to prepare your bid, return to this email and use the green **“Download Plan Room Files”** button to download the plans and other relevant documents.

- **Prepare your bid** as normal and submit that to us by replying to the bid request email. You can reply with an attachment or text in the body of your email reply.


# Trade Partner Guide

## Purchase Orders

When you receive a purchase order through the system, you will be provided with the project name and address, scope of work and agreed upon pricing. Any files relevant to the PO will be attached to the email you receive.

When you receive a PO, here's what you can do:

### A purchase order has been issued to you.

 **PO #108 - Excavation**  
1365 Octania Road

Do you accept this purchase order?

Scope of Work FROM SELECTION - 2.02 Excavation (Line Items 1,2)

1. Excavate for footings, frost walls and foundation. If ledge or rocks larger than 3 cubic yards are encountered Owner shall be responsible for extra costs associated with removal of such.  
2. Install perimeter drains at footings with outlet running to daylight. Drain shall be 4" perforated SD pipe surrounded by crushed stone. Stone shall be covered with filter paper or fabric.  
3. If necessary, retaining walls shall be constructed by others.  
4. Foundation shall be backfilled with well-drained material.  
5. All areas of site disturbed by construction shall be rough graded.  
6. Excavate and backfill for well lines and underground power lines. Length of trench is not to exceed 300 feet.

Line Items

	Description	Qty	Unit Price	Total
1	Excavation backfill and rough grading for foundation	1 each	\$11,000.00	\$11,000.00
2	Utility trenching - includes backfill	30 l.f.	\$1,250.00	\$37,500.00
				\$48,500.00

Files Westbridge Subcontractor Agreement.pdf

Project 1365 Octania Road  
1365 Octania Road  
Stanardsville, VA 22973  
[Get directions](#)

- **Review the details** of the purchase order including scope, pricing and any file attachments.
- If you have any questions or comments regarding the PO, **simply reply to the email** to send those back to us.
- At the top of the PO email, **indicate your acceptance** of the purchase order and sign if requested.
- **Print a copy of the PO** for your records using the "View Printable Version" button.


**How do I comment?**  
Simply reply to this email.

# Trade Partner Guide

## Task Assignments

You will receive task assignments to alert you to work that we've scheduled you to do. The task assignment email includes all of the information you need including the task description, project name and address (with directions link!), any relevant details of the work and the assigned dates, if applicable.

**A new schedule task is assigned to you.**

 <b>Set up basement walls</b> 1365 Octania Road	<b>This to-do has been updated.</b>
Confirm? <input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> <b>Fix cabinet door in kitchen</b> 123 Main Street
Start 10/16/2018 Finish 10/17/2018 Trade Partner GC - Jesse	Description There are several cabinets in the kitchen where the doors do not fully shut. Please take a look and fix Due Date 10/29/2018 Trade Partner GC - Jesse
Project 1365 Octania Road 1365 Octania Road Stanardsville, VA 22973 <a href="#">Get directions</a>	Project 123 Main Street 123 Main Street Charlottesville, VA 22901 <a href="#">Get directions</a>
<b>How do I comment?</b> Simply reply to this email. It will be visible to the builder's team partners but not to clients.	<b>How do I comment?</b> Simply reply to this email. It will be visible to the builder's team and other trade partners but not to clients.

When you receive task assignments, here's what you can do:

- **Review the task** details and dates to make sure you're available
- **Review any relevant files** that might be attached
- If you have any questions or aren't available on the assigned dates, please **just reply to the email** to let us know. We can easily communicate back and forth on each individual task you're assigned to work out any details or other arrangements.
- **Confirm** the task if requested.
- **Put us on your calendar!**

If there are any changes to the task information or dates, you'll receive another "Updated" task assignment email letting you know of those changes. As noted below, you can also receive a summary email to remind you of all your upcoming tasks, so you don't have to worry about keeping up with all of these individual emails. If you aren't receiving that already, let us know and we can turn those on!

# Trade Partner Guide

## Task Summaries

You may receive task summary emails one or more days each week. This is a single email that will summarize your overdue and upcoming tasks for our projects.

From this email you can easily see the project name and address, task names, details and dates. You can also confirm your availability for tasks by clicking the “Confirm” link next to each item.

Here are tasks assigned to you.

### Overdue

<p><b>123 Main Street</b> <a href="#">123 Main Street, Charlottesville, VA 22901</a></p> <p><input checked="" type="checkbox"/> <b>Fix leak in bathroom faucet</b> GC - Jesse <span style="background-color: red; color: white; padding: 2px;">Jul 28</span></p>	
<p><b>1365 Octania Road</b> <a href="#">1365 Octania Road, Stanardsville, VA 22973</a></p> <p><input type="checkbox"/> <b>Set up basement walls</b> GC - Jesse (Not confirmed) <a href="#">Confirm</a></p>	<p style="text-align: center;"><b>Monday</b></p> <div><p><b>123 Mayberry House</b> <a href="#">123 Main Street, Mayberry, AL</a></p><p><input type="checkbox"/> <b>Foundation</b> GC - Jesse (Not confirmed) <a href="#">Confirm</a> <span style="float: right;">Oct 22– Oct 29</span></p></div> <p style="text-align: center;"><b>Tuesday</b></p> <div><p><b>123 Mayberry House</b> <a href="#">123 Main Street, Mayberry, AL</a></p><p><input type="checkbox"/> <b>Foundation</b> GC - Jesse (Not confirmed) <a href="#">Confirm</a> <span style="float: right;">Oct 22– Oct 29</span></p></div> <p style="text-align: center;"><b>Wednesday</b></p> <div><p><b>123 Mayberry House</b> <a href="#">123 Main Street, Mayberry, AL</a></p><p><input type="checkbox"/> <b>Foundation</b> GC - Jesse (Not confirmed) <a href="#">Confirm</a> <span style="float: right;">Oct 22– Oct 29</span></p></div> <p style="text-align: center;"><b>Next 60 Days</b></p>

## Communications


As with the items above, anytime you receive an email from the system you can simply reply to those notifications to communicate back with us. This makes sure that the right people get notified of your response and that things stay organized for accurate tracking of information and decisions.

You may also receive direct comments on your tasks or other items. This email alert will tell you who is reaching out and which project and item the message is related to.

When you receive a comment email, you can:

**Amber Harlow commented on this to-do.**

**Fix cabinet door in kitchen**  
123 Main Street

 **Amber Harlow** Oct 19 4:55 PM  
The client will be home next Friday afternoon. Would you be available to stop by then? Let me know if I can give her a time.

**How do I comment?**  
Simply reply to this email. It will be visible to the builder team, partners (currently none) but not to clients.

[View conversation in site](#)

- **Note who your response will be shared with.** This will be noted at the bottom of your alert email.

- **Simply reply** with any additional questions or comments.

You'll always be able to see any previous comments from other users on that thread, so there's no need to sort back through other emails to follow the trail of communications.