

COCONSTRUCT™

# Client Guide: Open Book

Welcome to your project!

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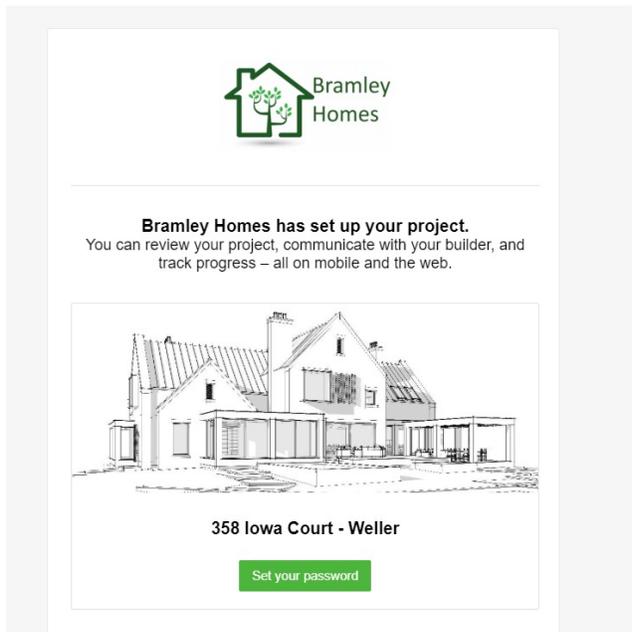
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# Getting started



The first step to accessing your project will be to look for the **Welcome email**. This will provide you with a link to set up your password and access your job information.



The online portal will provide you immediate access to updates on your project and will also allow you to communicate with your team effectively. This guide will give you an overview of your system, where to find information and how to communicate with us.

When you receive the **“Welcome to your project”** email, here’s what you’ll want to do:

- 1.** Click the green **“Set your password”** button. This will open a page where you can create a password for your system and will immediately log you in for the first time
- 2.** **Bookmark the login URL** under “In the future you can log in here”. This will allow you to quickly get to your system moving forward.
- 3.** If you’d like to access your project from your smartphone, you can **download the mobile app** as well. Just open the Google Play or App store on your phone and search “CoConstruct”. You’ll log into the app using your email and the same password created above.

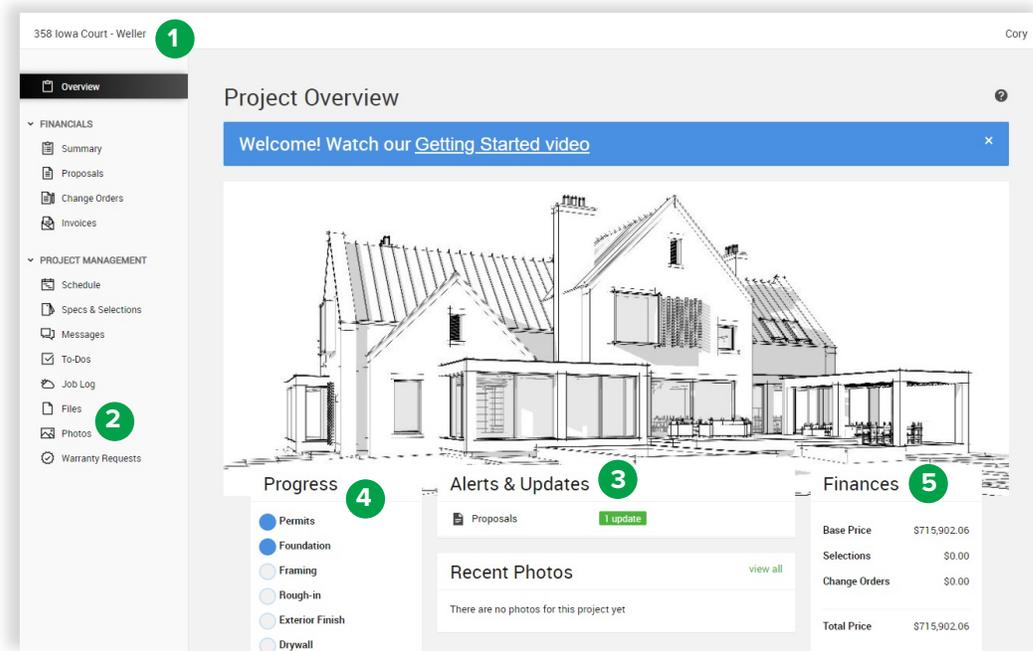
*If you ever misplace your password, you can use the “Forgot Password” link on the login page to have a reset email sent to you.*



# Project Overview

When you first log in, you will see your **Project Overview** page. This will be your main dashboard for reviewing Alerts & Updates for your project and navigating through the system.

Start out by watching the “Getting Started” video in the blue bar at the top of your screen. This will give you a great visual walk through of navigating your project to complete this written guide.



## 1. Project Selection:

At the top of your project overview, you will see the name of your project listed. If you have multiple jobs going on, you can click the arrow next to your project name to navigate through those jobs.

## 2. Navigation Bar:

To the side of your screen is the navigation bar. Use this to navigate through the site and access the specific information you're looking for – Specs & Selections, Files or Photos or Messages.

## 3. Alerts & Updates:

This section of your overview will call out updates to your project that need your attention as well as alert you to upcoming selection deadlines or approval documents needing your review.

## 4. Progress:

You can view an overall layout of your projects schedule progression and updates on completion of those milestones.

## 5. Finances:

This provides you with an at-a-glance overview of where your project financials stand including all selections you've made and approval documents. Further details on where these numbers are coming from can be found under the “financials” tab.

## Summary Page

Your project's Summary tab will show you a summary of your project's financial information. This page is laid out to show your starting contract price at the top, then lay out the specifications of your job along with any selections or changes from plan that resulted in overages and credits. At the bottom of the page, you can see the standing total price of the project taking all of these into account.

Summary	
Base Price	\$651,320.18
0100 Change Orders/Additions (1)	\$3,672.50
1000 Preparation Preliminaries (5)	\$0.00
2000 Excavation and Foundation (4)	\$0.00
3000 Rough Structure (7)	\$0.00
4000 Roofing (2)	\$4,887.50
4100 Masonry (2)	\$980.00
4500 Windows and Doors (2)	-\$414.00
4700 Insulation (1)	\$0.00
4800 Exterior Finishes (2)	\$0.00
5000 Drywall (1)	\$0.00
5100 Flooring (1)	\$0.00

The Summary page is a great place for you to keep track of the financial implications of your decisions to help you make the right selections and avoid surprises.

Here are some tips for using this page:

Use the **Expand/Collapse** options at the top right and the "+" next to each item to change from a detailed to summary view of the financials. This will help filter out unnecessary information while you're analyzing your choices.

Use the **"Group By: Status"** box above the Expense Summary to sort your Financials page by the statuses listed below. This will allow you to see the specific items making up each amount noted in the Expense Summary.



# Expenses

Expense Summary	
Base Price	\$651,320.18
Approved Change Orders	\$9,702.50
Locked Selections <a href="#">Exclude</a>	\$0.00
Unlocked Selections <a href="#">Exclude</a>	\$5,453.50
<b>Total</b>	\$666,476.18
Invoiced	\$65,661.88
Payments	\$54,520.63
<b>Amount Due</b>	\$11,141.25

The **Expense Summary** gives you a status overview of your total project price:

**Approved Change Orders:** These approval documents have been signed off and finalized. You can view the details of these by going to the “Change Orders” tab.

**Pending Change Orders:** These approval documents are still awaiting approval by at least one party. You can view the details of these by going to the “Change Orders” tab.

**Locked Selections:** These selection choices have been made and locked, usually because the deadline has passed.

**Unlocked Selections:** These selection choices have been made but not finalized yet. You will have the option to go to your Specs & Selections page and use the “Change Choice” link to choose a different option.



The **Payment Summary** on the right hand side will list the dates and amounts of payments you’ve made so far. You can always check here to confirm if your latest payment has been received and processed by our team.

Payment Summary	
Date	Amount
5/9/2018	\$5,000.00
<b>Payments to date</b>	\$5,000.00

## Have questions about project financials + expenses?

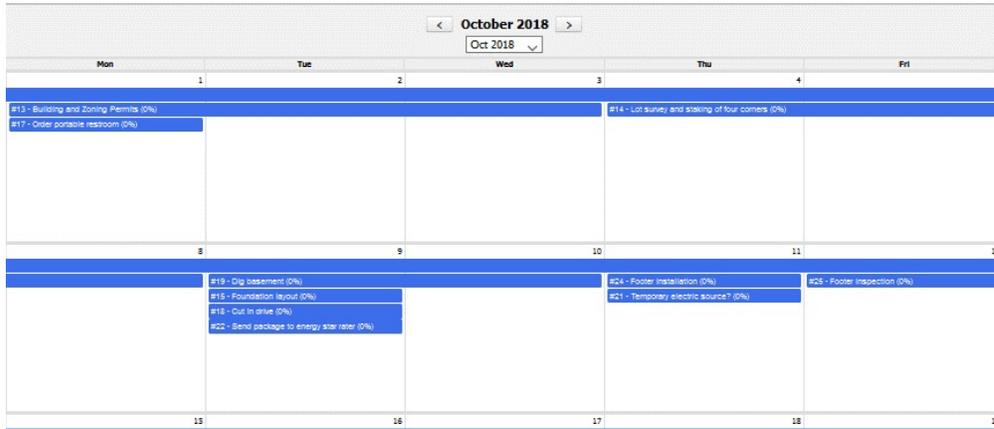
Any time you have questions on an item on the Summary page, click the item name and go over to the Specs & Selections page. From there select “View/Add Comments” on that items and send us a message! This will direct the message to the correct people on our team and keep conversations organized and easy to find.

If you’re ever in doubt or having trouble finding the item, just head to the “Messages” tab at the very top of your project and send us a note there.

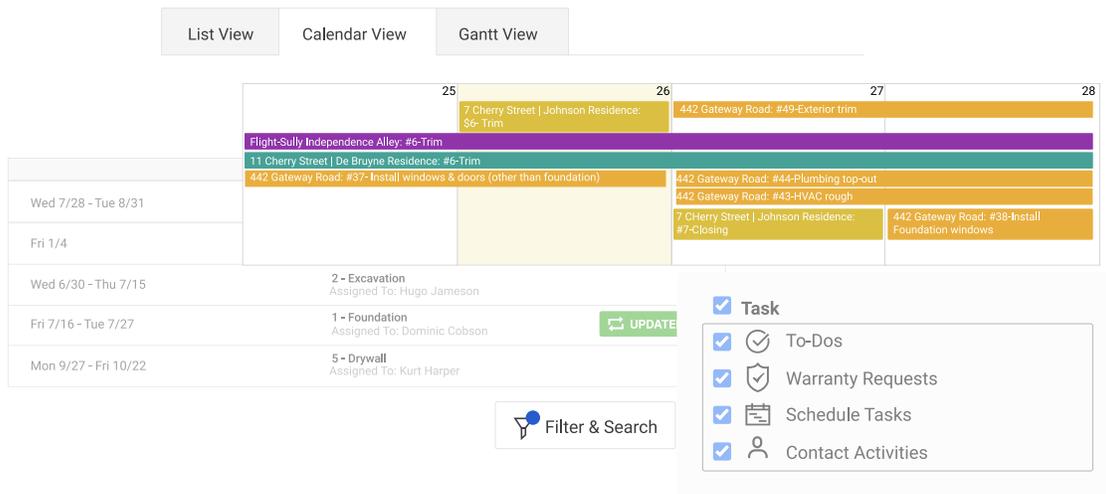


# Schedule

Your schedule tab will give you an overview of the planned workflow of your project. Here you can monitor the progress of your job and stay on top of the Selections that need to be made to keep things on track.



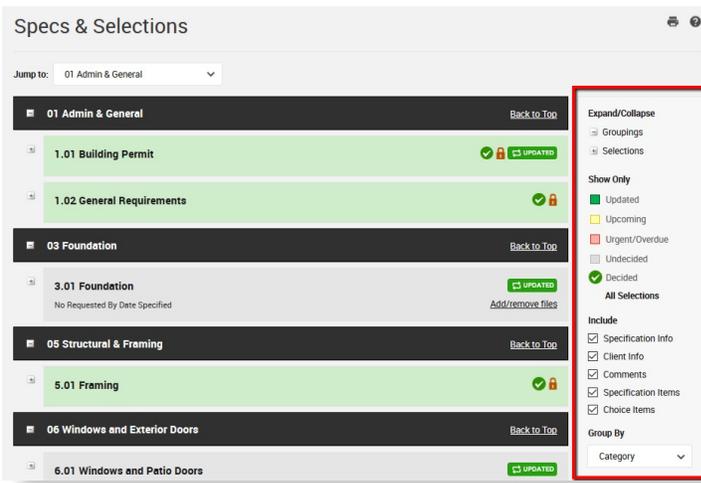
You'll see a high level view of the schedule including the name, dates and duration of tasks. The schedule will update to reflect any changes made to the schedule.



## Questions about the Schedule?

If you have questions about anything on your schedule view, head to the Messages tab at the top of your screen and let us know! Be sure to reference the task or dates that you're looking at so we can best answer your questions.

# Specs & Selections



## Specs & Selections

The Specs & Selections page will be the main page for you to communicate with our team, view and make selections and review the specifications for your project.

This page will show the same information as your original project proposal.

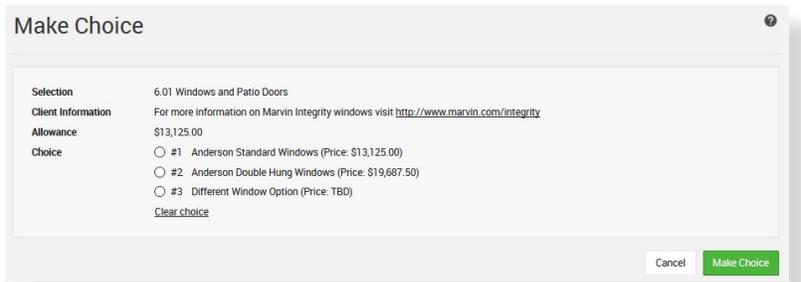
*Here are some tips for navigating this page:*

- 1. Use the gray filter box** at the top right of the page to help you organize and filter out the specific information you want to review.
- 2. Keep an eye out for the green “Updated” icons.** This will alert you that an item has been updated with new information.
- 3. Pay attention to the items highlighted in yellow** – these indicate choices that have an approaching deadline. You can easily filter for these items using the Filter box. When the highlight turns red, the decision deadline has passed and the item needs immediate action to avoid delays to the project.
- 4. Use the “Add/remove files” link** on any unlocked selection items to provide us with attachments relevant to the item you’d like for us to review.

## Questions about Specs & Selections?

Use the “View/Add Comments” link on each item to request clarification or additional information on a certain item. This will allow us to know which item you’re referring to and keep our communications organized and easy to find.

# Viewing Choices



**Make Choice**

**Selection** 6.01 Windows and Patio Doors

**Client Information** For more information on Marvin Integrity windows visit <http://www.marvin.com/integrity>

**Allowance** \$13,125.00

**Choice**

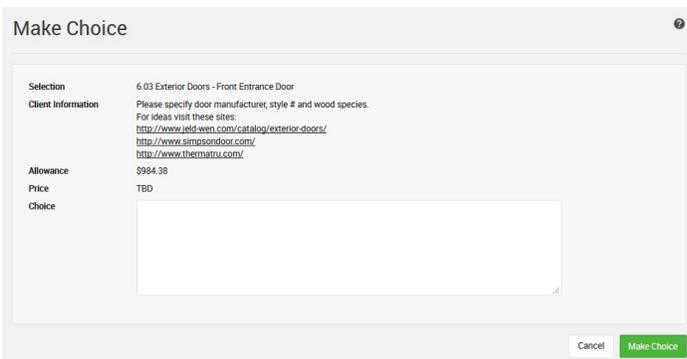
- #1 Anderson Standard Windows (Price: \$13,125.00)
- #2 Anderson Double Hung Windows (Price: \$19,687.50)
- #3 Different Window Option (Price: TBD)

[Clear choice](#)

Cancel **Make Choice**

When viewing the choices on your Specs & Selections, you will see some specific information to pay attention to:

- Review the “Specification Information” and “Client Information” fields. This is where relevant information on what needs to be selected or details around the choice will be entered. These fields may also provide specific information you need to provide as part of making your choice.
- If an amount has been allotted for the item in your original proposal, you’ll see an “Allowance” associated with the item.
- Review any specified options and the associated prices to make your decision.



**Make Choice**

**Selection** 6.03 Exterior Doors - Front Entrance Door

**Client Information** Please specify door manufacturer, style # and wood species.  
For ideas visit these sites:  
<http://www.jeld-wen.com/catalog/exterior-doors/>  
<http://www.simpsondoor.com/>  
<http://www.thermatu.com/>

**Allowance** \$984.38

**Price** TBD

**Choice**

Cancel **Make Choice**

When you’re ready to record a decision, click the Make Choice button on the selection item.

If there are standard options we’ve provided for you to choose from, click the option you want and hit “Make Choice”.

If there is an allowance where you’ve picked out your own selection from a suggested vendor or website, enter the requested information into the Choice text field and select “Make Choice”.



## Change Orders

The Change Orders tab will show you very similar information to the Financials Summary page mentioned previously in this guide. This page is ordered by the status of Specs & Selections, listing pending and approved Change Order documents at the top.

If a Change Order document is highlighted in yellow, this means that it is still waiting on at least one party to approve. The “Your Approval Needed” banner let’s you easily see if a document is still waiting for your review and sign off.

Just click “View Change Order” to review the full details of the document and indicate your approval if needed. From the change order detail screen you can also print a copy for your records if you choose.

<b>Base Price</b>	<b>\$404,170.66</b>												
<b>Change Orders (2)</b>	<b>\$12,253.13</b>												
<b>Addition of Back Deck</b> Status: Approved - Billed (Invoice #: CC-398852) <a href="#">View Change Order</a>	<b>\$11,812.50</b> <b>UPDATED</b>												
<table><thead><tr><th>Category</th><th>Selection</th><th>Choice</th><th>Revised Budget</th><th>Budget</th><th>Difference</th></tr></thead><tbody><tr><td>00 Changes from Plan</td><td><a href="#">Add Back Deck</a></td><td>12'x12' Deck - Composite decking</td><td>\$11,812.50</td><td></td><td>\$11,812.50</td></tr></tbody></table>	Category	Selection	Choice	Revised Budget	Budget	Difference	00 Changes from Plan	<a href="#">Add Back Deck</a>	12'x12' Deck - Composite decking	\$11,812.50		\$11,812.50	
Category	Selection	Choice	Revised Budget	Budget	Difference								
00 Changes from Plan	<a href="#">Add Back Deck</a>	12'x12' Deck - Composite decking	\$11,812.50		\$11,812.50								
<b>Light Bulb Conversion</b> Status: Awaiting Approval <a href="#">View Change Order</a>	<b>\$440.63</b> <b>YOUR APPROVAL NEEDED</b>												



# Invoices

The invoices page will display all issued invoices for your project so you can easily keep track of past and current invoices.

Your invoices page will reflect a total amount invoiced as well as the total payments received to date on your project. Once payment is received, the invoice status will be updated to Paid and the payment amounts reflected in the total so you can easily keep track of your finances on the job.

Invoice	
<b>Summary</b> Site Prep Invoice	<b>Number:</b> 2 <b>Issued:</b> Jun 20 2021 <b>Due Date:</b> Jun 30 2021
<b>Issued By</b> Jameson Home Improvement 2747 Woodlands Rd Charlottesville, VA 22901 (540) 587-0913	<b>Project</b> 11 Cherry Street   De Bruyne Residence
	<b>Issued To</b> Andros De Bruyne Lindsay De Bruyne
Item	Amount
1220 Import / Export Fill Dirt and Material – 100% Complete	\$3,312.50
1300 Demolition – 100% Complete	\$240.62
1470 Electric Service – 50% Complete	\$6,000.00
1480 Telephone Service – 50% Complete	\$101.88
2020 Rough Grading – 50% Complete	\$3,375.00
Total	\$13,030.00

[Pay Now](#)

# Budget

The budget page of the project will allow you to track the total cost of your job category. This page makes it easy to see how changes, selections and actual costs from our vendors, subcontractors and internal labor are affecting your project total.

The **Original** column will reflect the initial estimated amounts of your project from the proposal.

The **Revised** column shows changes to the original costs resulting from your selection choices or change orders through the course of the job. This helps you easily track the impact of changes and choices in each category of the project.

The **Committed** column displays our contracted costs with vendors and subcontractors that have been issued to-date on the project. This allows you to see

where those costs might vary from our originally estimated costs ahead of time.

The **Actuals** column represents the actual costs the builder has assumed on the project from paying vendors, subcontractors and our internal teams.

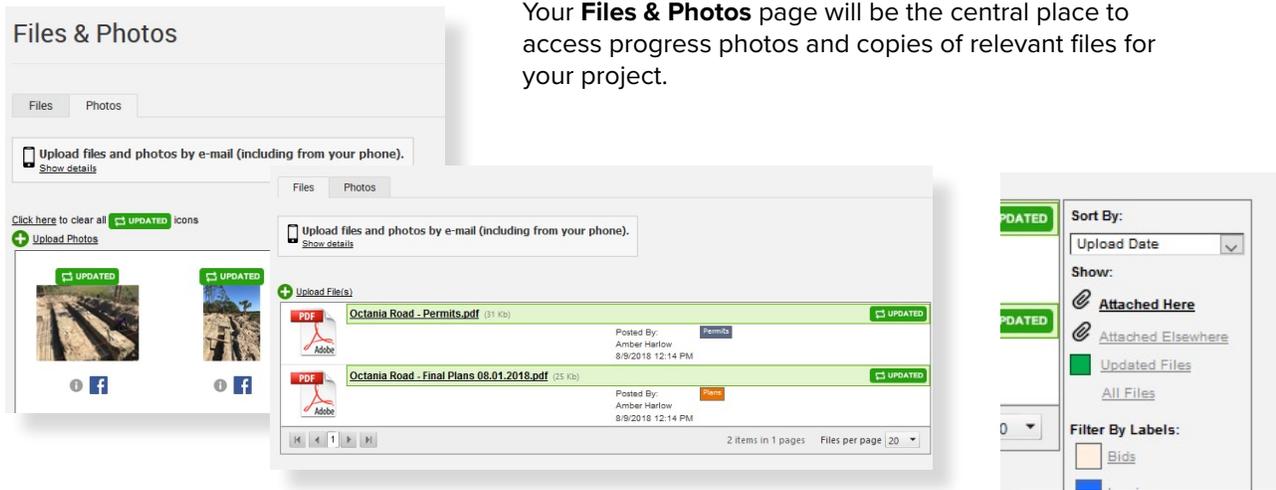
When a cost is marked as **Complete**, this indicates that we have received all bills and invoices expected for that category. This will credit any variance between the budgeted costs and actual values to your project's total price.

The **Project Total** values at the bottom of your budget will allow you to see the overall impact of selections, changes and actual project costs to-date onto the overall price of your job so you know where you stand throughout the job.

	Accounting Code	Original	Revised	Committed	Actuals		
>	1010 - Architectural Design	4,100.00	4,100.00		<u>3,000.00</u>		
>	1030 - Permits	28,000.00	28,000.00	<u>7,600.00</u>	<u>5,200.00</u>		
>	1210 - Lot Clearing	3,000.00	3,000.00		<u>1.00</u>		
>	1220 - Import/Export Fill Dirt and Material	3,300.00	3,300.00		<u>16,000.00</u>		
>	6350 - Fences	5,184.00	5,184.00	<u>5,184.00</u>	<u>5,184.00</u>		
>	7100 - Project Admini	506.00	716.00	150.00	716.00		
		Original	Revised	Committed	Actuals	Projected	Difference
	Cost	517,656.14	526,470.14	137,876.20	137,876.20	527,734.14	1,264.00
	Profit	133,664.04	139,806.04		139,806.04	138,542.04	-1,264.00
	Total Sell Price	651,320.18	666,276.18	137,876.20		666,276.18	0.00



## Files + Photos



Your **Files & Photos** page will be the central place to access progress photos and copies of relevant files for your project.

You can easily see when new files or photos are uploaded by looking for the “Updated” icon on your Project Overview under “Alerts & Updates”. Once you’ve reviewed the file or photo, be sure to click the Updated button to clear that off so you can quickly identify the newest items.



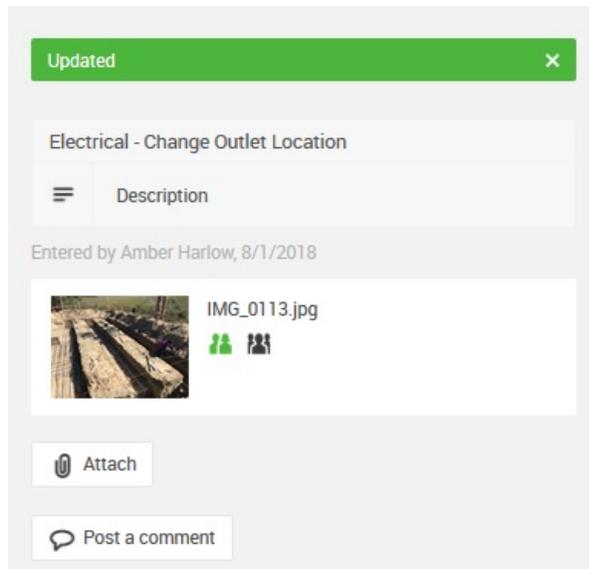
Use the filter box on the right hand side of your page to view files or photos attached elsewhere throughout your project (Specs & Selections, Approval Documents, To-dos, etc).

You can also filter your current view by the provided labels if there is something specific you need to locate.

You can easily upload files or photos for us to review by clicking the “Upload” link at the top left of the corresponding page. If you’d like to upload photos from your phone or tablet you can easily do so from the mobile app OR use the unique email provided at the top of the Files & Photos page.

## To-dos

The to-dos page will mainly be used for keeping our team and trade partners up-to-date on work that they need to perform.



However, there may be tasks that are shared with you so that we can communicate with you on the work being done or make you aware of the progress of certain tasks.

You can review the task information, review/add attachments and post a comment to these tasks if you have questions or additional information you'd like to provide to us.

Like other pages, you will see the "Updated" banner to let you know when the task has been changed or a new comment added.

### **Have questions about To-dos?**

If you have questions about a task, "Post a comment" directly to that item!



## Job Log

In the Job Log, you will see a report of the weather on your job site, important notes regarding the work completed or weather impacts. You may also see photos attached directly to the Job Log to show important progress from the job site for that day.

**Wednesday, September 19, 2018** UPDATED

**Visitors**  
Client visited job site - we reviewed progression of site work  
Amber Harlow, 9/19/2018, 10:46 AM



**Fog**  
**85° 63°**  
**0 mph Wind**  
**80% Humidity**

Powered by Dark Sky



Wet ground-2.jpg

**Tuesday, September 18, 2018** UPDATED

**Trade Work**  
Completed lot clearing  
Amber Harlow, 9/19/2018, 9:59 AM



**Partly Cloudy**  
**81° 64°**  
**1 mph Wind**  
**84% Humidity**

### Have a question about a job log entry?

Job Log entries are posted by our team. If you ever have questions about information posted in the Job Log, head to the Messages tab and let us know!



# Messages

The screenshot displays the CoConstruct Messages interface. At the top, there are three tabs: "Clients", "Team Members", and "Trade Partners". Below these tabs is a search bar with the text "City Roofing" and a dropdown menu showing "Clients & Trade Partners". A "Start a new message..." input field and a "Send" button are also visible. Three message cards are shown:

- Felicia Brimcombe** (1/20/2021 10:34 AM): "@Derek Bernard Could we explore the possibility of a green roof? What does that entail for installation? Would that delay the schedule?"  
Response: "Thanks - Felicia"
- Derek Bernard** (1/20/2021 10:35 AM): "@Felicia Brimcombe I'll speak to the scheduling perspective. A green roof would push our schedule out by roughly 15 working days. It requires a bit more equipment and the delivery would be delayed by having these discussions at this point in construction."  
Response: "Thoughts?"
- Jackson Murach** (1/20/2021 10:41 AM): "Felicia - Thanks for your interest in alternative roofing materials. Reference the web link below for all the options we have available available."

The best way to communicate in CoConstruct is by replying to an email notification or using the “comment” links throughout the site to attach your notes directly to the items you’re discussing. But, when you have something more general to say, use the Messages page as the page of last resort. This page is simply a chronological listing of notes so everything is still in CoConstruct. It is not organized by topic, so it is in everyone’s best interest to post items elsewhere, with their related topics, where they are easier to find.

In a similar way the “Questions” tab will be here for you to ask our team general questions. The questions page allows us to keep the back and forth on that question more organized than the ongoing thread of the main Messages tab.