

PlanWell BidCaster

BidCaster is an online invitation to bid tool incorporated into PlanWell Enterprise; allowing users to transition seamlessly between the two products. With proper permissions, BidCaster allows you to create new project shells as well as send announcements regarding existing projects to any user in your address book; all from the familiar PlanWell Enterprise interface. A basic understanding of BidCaster will allow you to use its functionality throughout the entire life of your project.

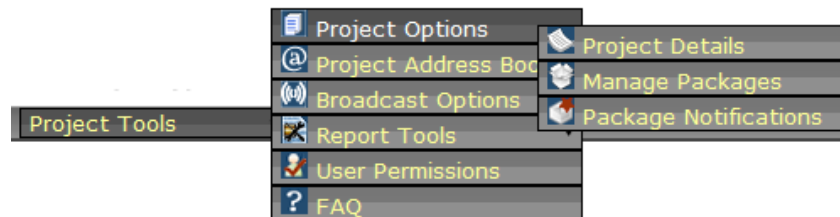
Accessing BidCaster

BidCaster functionality can be added into any of your PlanWell Enterprise projects by contacting your reprographer. Your reprographer can define which of your employees can view and complete BidCaster functions for a specific project in PlanWell. Once these permissions have been assigned, you may log into PlanWell and access the appropriate project. Although the project will appear the same, additional functionality has been built in around it.

Preparing a Project for BidCaster Activity

Before sending your first broadcast, there are some project adjustments recommended to ensure you are able to use BidCaster to its full capability.

All preparatory functions can be found in the “Project Tool” – “Project Options” menu.



Project Details –

By selecting Project Details within the Project Options menu, you will be able to enter all project details critical to those parties interested in working on the project as well as broadcast settings which will speed up the broadcast process.

Project Details:

Many of the settings in the project details window will be populated from the basic project details that were necessary to add a project into PlanWell. It is recommended you complete any fields not yet populated as these details will automatically be pulled into your invitation to bid broadcast. This would include project timeline, bid due date, job walk through date, plans return date, deposit amount if applicable, if deposit is refundable and bid instructions. In addition to these fields, you will see fields for plans available and plans online message.

Plans Available – the plans available field is an automatic setting cannot be changed by the client. “Yes” indicates that project documents have already been indexed into the project while “no” would indicate the documents have not yet been posted.

Plans Online Message – when a bid broadcast is sent out through BidCaster, it contains a link that allows direct access into the project in PlanWell. The link is imbedded in the text found in the Plans Online Message box. By default, the link will read “Click here to view and orders plans online, using PlanWell.” If you do not prefer to use this verbiage, you may change this text to whatever you feel is appropriate. Regardless of what the text reads, the link into the project in PlanWell will remain.

Project Details (* indicates required fields)
Important Note: Hover your cursor over the project fields to view associated [HTML merge tags](#) for BidCaster templates

Project Name: Garden Gates *	Bid Due Date: 4/15/2009 Time: 12:00 PM
Project Number: DEMO_720 *	Job Walk Thru Date: 4/15/2009 Time: 9:00 AM
Project Password: [Empty]	Plans Return Date: 4/29/2009 Time: 4:00 PM
Project TimeLine: Start: 3/16/2009 End: 6/30/2009	Deposit Amount: 50
Project Description: Apartment Complex *	Refund of Deposit : <input checked="" type="radio"/> Yes <input type="radio"/> No
Site Address1: 3005 Ranchview Lane	Bid Instructions: [Empty]
Address2: [Empty]	Plans Available: <input checked="" type="radio"/> Yes
City: Plymouth	Plans Online Message: Click here to view and order plans online, using PlanWell.
State: Minnesota *	
Country: USA *	
Zip: 55447	
Project Timezone: Central *	

Broadcast Settings

Manage ITB Templates html editor help guide Broadcast Templates: Single Broadcast Default.htm [Add] [Edit] [Del] [Set As Default Template] [Restore Default Templates] Email Response Templates: Default Response.htm [Add] [Edit] [Del] [Set As Default Template] [Restore Default Templates] Auto-Reminder Templates: Default_RSVP_Template.htm [Add] [Edit] [Del] [Set As Default Template] [Restore Default Templates]	Bid Packages Manage Packages Bid Package Architectural Package Mechanical Package Plumbing Package Concrete
---	--

Broadcast Settings:
At the bottom of the project details section you will find your broadcast settings. These include which templates you would like to use as well as what custom packages exist for use in your broadcasts.

Manage ITB Templates – for every broadcast sent, you may use up to three different templates. The term template is used to refer to the actual ITB document you would

send to your prospective bidders. These templates pull data from the project details and automatically populate the necessary information by using Merge Tags (a merge tag is displayed inside of brackets and will automatically extract information from the database for contractors or project information). They can be thought of as what makes the emails and/or faxes look the way they do. You may completely customize any template used in BidCaster. This process is discussed later in this document.

Broadcast Templates – by using the dropdown box, you may select the default template you would like to use to send the broadcast. This will be the email or fax your recipients receive announcing an invitation to bid or other project announcements. After selecting the desired template, click on [Set As Default Template]. You may change this default setting at any time.

Email Response Template – When BidCaster was first introduced as a stand-alone program, the recipients of a broadcast worked from multiple pages to view and respond to the bid announcement. After incorporating into PlanWell, the need for this extra step was eliminated. Email response templates remain in BidCaster for those users familiar with the original version of BidCaster. All new users may disregard this template.

Auto-Reminder Template –When you create a broadcast you can also specify a date in which anyone who hasn't responded or has responded with "maybe" will receive a reminder email that the bid due date is approaching and you have not yet been notified if they are bidding or not. You may select which auto-reminder template is used by default. Once selected, click on [Set As Default Template].

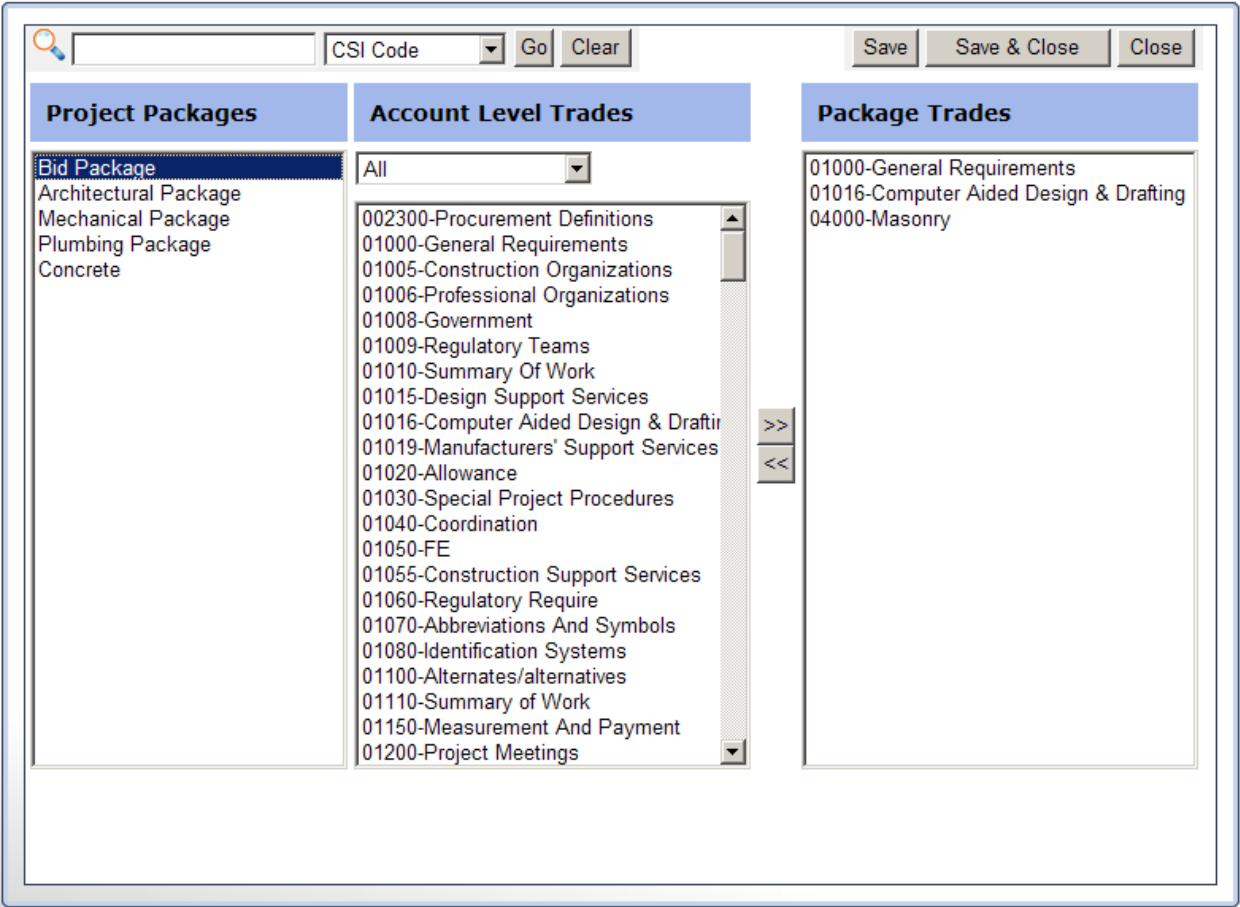
Bid Packages – the bid packages listed will match the list of bid packages used in PlanWell Enterprise under the category of Custom Packages. BidCaster will allow you to create automatic print orders (APO) using these packages. This process is discussed later in this document.

If, when reviewing the list of packages, you do not see one that matches your needs, you may click on "Manage Packages" to create a new package. As noted above, this new package will also be available in PlanWell Enterprise.

After reviewing and adjusting the project details and broadcast settings, we would suggest that you first use the [Save Project Changes] option and then after saving you can then choose to use the [Start a New Broadcast] option. We will discuss starting a new broadcast later in this document.

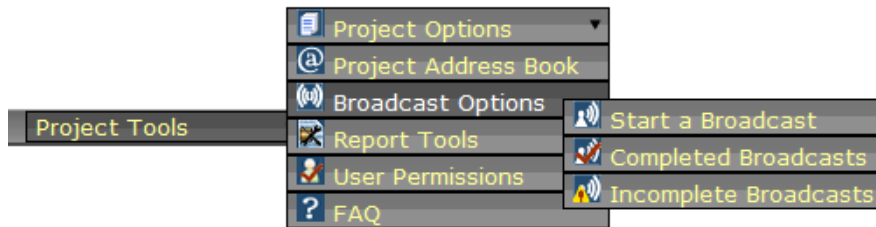
Manage Packages –The other BidCaster preparatory step is to assign trade information to your packages. This will allow BidCaster to automatically match users of a specific trade to packages associated with the same trade.

Select “Manage Packages” from the “Project Options” menu. Choose “Assign Trades to Packages.” The resulting window will list all available packages and your account trades. By highlighting a package, you can then select the desired account trades and use the arrow over buttons to assign them to the package. Choose [Save] and continue to the next package. Note: you must choose save before moving on to the next package or your selections will be lost. Once all packages have trades assigned to them choose [Save and Close.]



Creating a Broadcast

Broadcasts can be started from the project details window or by selecting “Start a Broadcast” from the “Broadcast Options” menu from your main project window.



BidCaster will pull your user information as well as all project details into the broadcast; allowing you to very quickly create a broadcast and send this out to all prospective bidders.

Begin the broadcast process by defining a name for the broadcast. It is recommended that you choose a name easily identifiable such as the date and name of the actual broadcast (I.e. 033109 Invitation to bid). Within the Invitation Details section are condensed lines for From Information, Project & Bid Information, Broadcast Attachments and Optional Invitation Settings. All fields can be expanded by clicking on the arrow down options to the left of the line; allowing you to review the full details of each section.

Create a new Invitation

Invitation Details		Broadcast Name:	<input type="text"/>	*
From Information	Company:	<input type="text" value="Solomon Frisk"/>	Contact:	<input type="text" value="Jerry Jacobs"/>
Project & Bid Information	Project Name:	<input type="text" value="Garden Gates"/>	Get Latest Project Details	Learn More..
Broadcast Attachments	Choose Template :	<input type="text" value="Single Broadcast Default.htm"/>	Edit	Total Attachment(s):
Optional Invitation Settings	Broadcast Acknowledgment Type:	<input type="text" value="Invitation to Bid"/>	Learn More...	

From Information – This information is automatically populated based on your user details. You may make any desired changes and choose [Save]. For example, you may decide to have a project assistant be the recipient of all responses; you can do this by changing the “Contact,” “Email” and “Phone” fields. The changes you make are for this broadcast only.

Project and Bid Information – This information is automatically populated based on the project details you set in the preparatory stage. You may make changes to any of the information with the exception of bid instructions and choose [Save]. These changes will be for this broadcast only. If you would like to change the bid instructions or if you need to make permanent changes to the other project details fields, you must do this from the Project Details page.

If you recently made changes to the project details – such as adding/adjusting the bid instructions – and those changes are not showing in the Project and Bid Information fields, click on [Get Latest Project Details] to pull the changes in.

Broadcast Attachments – The broadcast attachments section shows your default broadcast template as well as allowing you to include attachments to the email, fax or both. If necessary, you may use the dropdown box to change the default template. The template change will be for this broadcast only.

Email Attachments – this option allows you to include a document along with your email broadcasts. Although the name states “attachment” you will actually upload the document to the PlanWell BidCaster servers and a link to that document will be included in the email. This prevents potential issues with the email clients that strip attachments or block emails with attachments as well as eliminating any problems with the file size being too large for email.

To attach the file click on “Email Attachments” to open the existing document library. This will provide you with a list of all documents you have uploaded previously. If the desired document is in the list, click on the box next to it and choose [Save and Close]. You may select as many documents as desired. If the document is not yet in the library, select “Click here to Manage File Attachments Library,” browse to the desired document and choose “Upload.” Once the upload is complete you will be returned to the library where you can select the document.

Fax Attachments – this option allows you to include a document with the faxes that are sent. Like the email attachments, you will upload the desired document to the PlanWell BidCaster servers. You may upload any small format file type; our servers will automatically convert the file to the proper format for faxing.

To attach the file click on “Fax Attachments” to open the existing document library. This will provide you with a list of all documents you have uploaded previously. If the desired document is in the list, click on the box next to it and choose [Save and Close]. You may select as many documents as desired. If the document is not yet in the library, click on “Click here to Manage File Attachments Library,” browse to the desired document and choose “Upload.” Once the upload is complete you will be returned to the library where you can select the document.

Because BidCaster has converted your uploaded document into a different format for faxing, it is recommended you choose “Fax Count & Preview” to verify you are faxing the expected number of documents and that the document looks as expected.

Optional Invitation Settings – Within this section you may select what type of broadcast you are sending and turn on any optional settings.

Broadcast Acknowledgement Type – You may choose if you are sending an invitation to bid or information acknowledgement broadcast. Your selection will alter the text the recipient sees and what they are asked to do with it.

Invitation to Bid – with an invitation to bid, the recipient is presented with a response screen stating “Invitation to Bid” and requesting a “yes,” “no” or “maybe” response if they are going to bid the project. Invitation to bids expect this additional action by the recipient.

Information Acknowledgement – if you are using BidCaster to announce something rather than invite someone to bid, you would select “Information Acknowledgement.” The recipient in this case is presented with a screen that states this is an informational only broadcast and will not be asked if they are bidding or not. This feature allows you to use BidCaster throughout the life of your project; announcing, for example, project meetings, theft alerts or grand opening dates.

“Turn on Email Response Template” – as mentioned above, this template is only used when you choose to use a two page broadcast. This page will only be displayed to recipients that receive your ITB via email. This template was required when BidCaster was first introduced as a stand-alone program. After incorporating into PlanWell, the need for this extra step was eliminated. For this reason, the email response template is turned off by default. If you would like to use this template, place a check in the box next to this option.

“Forward Bid Acknowledgement Responses to my email” – select this option if you would like all responses to come to your email in addition to being tracked in the BSR. This option will be invisible to your recipients with the email being sent to you in the background. This option often has additional fees associated with it; please speak to your reprographer if you are interested in using this option. It is important to note that if you, for example, invite 100 bidders; you potentially could receive 100 notices into your email account alerting you to bidders’ responses to the bid offer.

“Turn on Auto Reminder” – as mentioned previously, you may set a reminder email to be sent to any broadcast recipients who have not responded to a bid invitation by a defined date. When you select this option, the window will expand out allowing you to specify the date and time you would like the reminder to be sent. You may also change the default template used for this reminder.

On the date specified, BidCaster will automatically gather anyone who has not responded or who has responded “maybe” and send an email reminding them of the bid due date and ask that they respond if they are going to bid. There are no additional actions required by you.

Pick Trade(s), Recipient(s) – Within this section, you will complete the heart of the broadcast, defining recipients and creating, if desired, automatic orders for those recipients indicating they will be bidding the project. Most customers refer to this as “Building your Bid Pick List”.

Add Recipients – After selecting [Add Recipients] you will be brought into a separate window showing your Master Address Book and allowing access into your Project Address Book, Planholders Address Book and Groups Address Book. As with all address book activity, you may locate recipients for the broadcast by utilizing basic search features or by clicking “more options” to allow for advanced search features.

“Auto Select Package Trades” – within the advanced search features is the selection for “auto select package trades.” As discussed previously, a step in preparing a project for BidCaster is to assign trades to packages. Within this “auto select package trades” feature, BidCaster will find those users in your address book with the same trade.

Check the box next to “Auto Select Package Trades.” All packages with trades assigned will be listed. Highlight a package and select [Search]. All individuals within the specified address book with that trade will be listed. You may select broadcast recipients individually by placing a check in the box next to an individual name or you may select all by placing a check in box located in the column header. Note: the search will work from the address book tab you are currently in. For example, if you are in the master address book tab BidCaster will find everyone in your address book matching the trade; if you are in the project address book tab BidCaster will find just those individuals in your project address book that match the trade.

As you identify the recipients for your broadcast and place checks in the boxes next to their name – either individually or globally – the “View Selected Contacts” tab will hold those recipients. You may review your list any time by clicking on that tab. When the list contains everyone you wish to include in the broadcast, choose [Save and Return] to return to the broadcast window with these individuals selected.

It is important to note, by default BidCaster will indicate that any recipient with an email address will be receiving the broadcast via email. If you want them to receive it via fax, place a check in the fax box for the individual. You may assign faxes to everyone in the broadcast by placing a check in the fax button in the column header. You may choose to send a broadcast via email, fax or both.

<input checked="" type="checkbox"/> Email	<input type="checkbox"/> Fax
<input checked="" type="checkbox"/> bidcaster.demo@gmail.c	<input type="checkbox"/> 763-694-0376
<input checked="" type="checkbox"/> bidcaster.demo@gmail.c	<input type="checkbox"/> 763-694-0376
<input checked="" type="checkbox"/> bidcaster.demo@gmail.c	<input type="checkbox"/>

Remove Selected – After returning to the broadcast, if you decide you would like to remove someone from the broadcast, place a check in the box next to their name and click on [Remove Selected]

Remove All – If you opt to remove everyone listed from the broadcast and begin the selection process over, click on [Remove All]

Save Changes – As you review your recipient list, you may find an individual listed that you need to change the email address, phone number or fax number for. You may type these changes into the appropriate fields. If this change is for this broadcast only, choose [Save Changes]; if the change is permanent place a check in the box next to “Apply Changes to the Master Address Book” before clicking on [Save Changes].

APOs – The final two options available involve assigning an “APO” to the broadcast. An APO is short for Automatic Print Order. The APO functionality allows you create a potential order for a package(s) for certain individuals receiving the broadcast. This order will only be fulfilled if those individuals respond “yes” to bidding the project. For example, you may indicate that all of your A list subs will receive the bid set package if they will bid the project. As these individuals receive the broadcast and make their bid decision, by simply replying “yes” an order will be automatically triggered in the background without any further actions needed by them. Those indicating that they will not be bidding the project will not receive any plans. All others in the broadcast who have not had the APO assigned to them will receive the broadcast and, if bidding, will be responsible for placing an order for the bid set package through PlanWell.

APOs can be assigned individually by placing a check box in the APO box for the individual(s). If you would like to assign the APO to all those individuals with certain trade ratings, there are two ways of completing this.

Check all APO with Rating at Least – To assign an APO to the lower rating numbers, you may indicate the trade rating next to “Check All APO with rating at least” and choose [Go]. All individuals with the selected rating or better will automatically be selected. For example, if you indicate that you would like an APO to go to everyone with a trade rating of at least 3, everyone with a 3, 2 or 1 rating will be selected.

Uncheck all APO with Rating at Least – you may use this in conjunction with the previous option to remove a lower trade rating. Specify the rating you would like to remove next to “Uncheck all APO with rating at least” and choose [Go]. That number and lower will be removed from the selected APO. In our above example, if you would like an APO for everyone with a rating of 2 and 3 only, you may remove the 1 rating by placing a 1 in this field and choose [Go].

After making all of your broadcast selections, choose [Next Step] to continue. You may also choose [Save All] to save your work and return later.

Assign Print Orders Configuration – If you assigned at least one APO you will be brought to the Assign Print Orders Configuration page where you can assign all remaining necessary information for this potential order.

Note: if you did not assign an APO, you will automatically bypass this screen.

Assign Print Orders Configuration :

Configure Recipient Packages [\[Add More..\]](#)

Item #	Package Name	Package CSI	Process Media	Bindery	Page Size	Description
1	Architectural Package	[View]	Bond	Staple	Full Size	
2	Bid Package	[View]	Bond	Staple	Half Size	

Select Recipients [\[Add More..\]](#) Available services for APO : CD Print Download [Add/Edit Services](#)

During Apply Down Retain Contact Defaults
Page 1 Of 1

Company Name	CSICodes	1	2	Delivery	Shipping Acc#	Enable Alternate Service	Service
<input type="checkbox"/> CDW Gary Johnson	[View]	1	1	Training and Demo Deliver		<input type="checkbox"/>	Print
<input type="checkbox"/> Concrete Barriers Steve Johnson	[View]	0	1	Training and Demo Deliver		<input type="checkbox"/>	Print

Configure Recipient Packages – within this section you may define the package specific printing options for this order. Printing options will be populated based on your default settings. If you would like to make changes to these default selections, use the dropdown boxes to make the necessary selections. You may remove a package from the APO order by clicking on the garbage can icon.

Add More – also within this section is the option to add more packages to your APO. This provides you with the opportunity to add packages which were not initially selected either in error or because the package does not have a trade assigned to it.

After selecting [Add More] you will be presented with all project packages not yet selected. Place a check in the box next to the package you would like to add and choose [Save and Close].

View – Click on “View” to see the CSI trades assigned to the package

Select Recipients – within this section you will set the recipient specific order details and optionally adjust the recipient list.

Add More – by clicking on this option, you will have the option to add broadcast recipients to the APO. This option will return you to the previous screen where you can select an individual(s) to add to the APO.

Remove from APO – if you would like to remove someone from the APO, place a check in the box next to their name and chose [Remove from APO]. Please note, this will not remove the individual from the broadcast, it will only remove them from the APO.

View – click on “View” to view the trades and ratings assigned to the recipient.

Quantity – by default, BidCaster will set that all recipients will receive one of any packages they are set to receive. You may change that number as necessary.

Note: if you added a package to the APO, you will manually need to set the quantities.

Delivery – your default delivery method will be selected. You may change this as needed

Shipping Acc# - you may type in either your shipping account number or the recipients shipping account number if using a commercial delivery service. If you are using your account number, you may use the apply down button to assign it to all orders

Print Services – the remaining three items in this section – “Add/Edit Services,” “Enable Alternate Service” and “Services” all tie together.

Add/Edit Services – click on Add/Edit Services to select how you want the recipients to receive the order. Your options are CD, Print or Download. You may select one or all three.

If you select CD, the packages documents will be burned to a CD along with PlanWell viewer. If you select Print, the order will be printed and delivered to the recipient. If you select Download, after the recipient indicates “yes” to bidding the project, a window will appear asking where they would like to download the files to on their computer or network. Once they have made this indication, the files will immediately download for their use.

Enable Alternate Service – by placing a check in this box, you are indicating that the recipient may choose how they would like to receive the order. They will be able to choose from any of the options you selected in the add/edit services window.

Service – indicate your desired service. You can apply the same setting to all by using the apply down button.

Please note, as mentioned above, if you indicated that you are allowing an alternate service, the recipient may choose to override your service selection and choose a different one. The advantage of this is that it will allow you to set that everyone will receive this order as a print order but will allow any recipient who has equipment in-house to override that setting and download the files immediately instead.

After making all of your APO settings, choose [Review and Submit].

Broadcast Review – on the review screen you are able to review the broadcast details and make any final changes before submitting. You will also be able to preview and test the broadcast. By selecting this, you will see how the broadcast email looks fully populated. If desired, you may select [Send Test] to send a test broadcast to your email and/or fax number. This will further help you ensure the broadcast looks exactly as expected. From this screen you do also have the ability to use the Print & Export option which would allow you to print a copy of the entire Bid List. Many customers like to use this option to review their list to make sure they have proper coverage for all selected CSI trades.

Broadcast Review Save Changes Previous Launch Broadcast Cancel Broadcast

Invitation Details

Broadcast Date: 3/27/2009 4:56:29 AM Central
 Broadcast Name: Initial Broadcast 2
 Email From:
 Email Subject Line:

Selected Trade(s), Recipient(s) Total Emails:[3] Total Faxes:[0] Total APO:[2]

Sort By : [Company Name](#) | [First Name](#) | [Last Name](#) | [Email](#) | [Fax](#) Remove Selected Remove All Clear Selection

	Company, Contact Name	CSI Trade(Rating)	[Notify via Email] Email address	[Notify via Fax] Fax Number	Preview & Test Broadcast	Include in APO
<input type="checkbox"/>	CDW Gary Johnson	[Click here to Add/Edit CSI Trade] 01000-General Requ..	<input checked="" type="checkbox"/> <input type="text" value="bidcaster.demo@gm"/>	<input type="checkbox"/> <input type="text" value="763-694-0376"/>	Preview & Test Broadcast	yes
<input type="checkbox"/>	Concrete Barriers Steve Johnson	[Click here to Add/Edit CSI Trade] 01005-Construction.. 01008-Government 01055-Construction..	<input checked="" type="checkbox"/> <input type="text" value="bidcaster.demo@gm"/>	<input type="checkbox"/> <input type="text" value="763-694-0376"/>	Preview & Test Broadcast	yes
<input type="checkbox"/>	ERS Paul Kuneck	[Click here to Add/Edit CSI Trade]	<input checked="" type="checkbox"/> <input type="text" value="bidcaster.demo@gm"/>	<input type="checkbox"/> <input type="text"/>	Preview & Test Broadcast	no

Page 1 of 1 Page

When everything looks as desired, choose [Launch Broadcast]. You will immediately be brought into the Completed Broadcast Summary tab where you may track the progress of this broadcast or any other completed broadcasts.

Broadcast History

Accessing your completed and incomplete broadcasts can be done through two main areas. After first logging into PlanWell and being presented with your project list, you may select [View Broadcasts] or after logging into your project you may select "Project Tools" > "Broadcast Options" and select if you would like to view your completed or incomplete broadcasts.

Public Planroom		Company Planroom		My Favorite Projects		Guest Access	
Find	<input type="text"/>	in all fields	<input type="button" value="go"/>				
<input type="button" value="remove from favorites"/>		<input type="button" value="create a new ITB project"/>					
Project Number	Broadcasts						
<input type="checkbox"/>	720	[view broadcasts]					
<input type="checkbox"/>	SOC Project	[view broadcasts]					
<input type="checkbox"/>	0118	[view broadcasts]					
<input type="checkbox"/>	Dry Creek Apartments	[view broadcasts]					

Completed Broadcast Summary – every broadcast sent for this project will be listed in the completed broadcast summary. To view valuable details, click on the broadcast name. This will open up the Broadcast Summary Report (BSR).

The broadcast summary report (BSR) provides you with critical information regarding the broadcast. Beyond basic project details and a list of recipients, you will be able to track all activity the broadcast recipients complete in response to the email. The BSR can be sorted by any of the columns or filtered by the information in the columns.

Email/Fax Status – these two columns will show the status of any email and faxes sent. By hovering over the status for any recipient, you will be presented with the email address or fax number the broadcast was sent to as well as the date and time sent.

Bid Status – Bid Status information is populated one of two ways. As recipients receive the email broadcast, they are given the opportunity to indicate if they will bid the project or not. Their responses are automatically shown in the BSR

For any recipient of a fax broadcast, they will notify you generally through fax or a phone call if they will be bidding. For these individuals, you may click on “Not Yet Responded” and manually enter their response.

Bidder Comments – When recipients respond to if they are bidding the project, they will have the opportunity to type a note to you. Any notes included in the response are listed in the bidder comments column.

Private Notes – Private notes are special notes you would like to add to a recipient. These notes are only viewable to you. You may add these notes by clicking on the “private notes” link for the individual.

Email Opened – Most fields in the BSR can be manually edited. The “email opened” field is an exception to this. The email opened field will only be triggered to “yes” when an emailed broadcast is opened by the recipient and the contractor clicks on the link for “Click here to view and order plans online, using PlanWell.”

Plans Viewed – Within the email broadcast is a link into PlanWell where the recipients can view and potentially order plans. If a recipient follows the link in the broadcast email and subsequently views any individual plan page, the “plans viewed” field will indicate “yes.”

Faxes sent may include details on how to access the project in PlanWell; however this activity does not automatically feed into the BSR. If a recipient indicates that they viewed the plans, you may manually change this field to “yes” by clicking on the “plans viewed” link.

Plans Ordered – Within the email broadcast is a link into PlanWell where the recipients can view and order plans. If a recipient follows the link in the broadcast email, and places an order, the “plans ordered” field will indicate “yes.”

Faxes sent may include details on how to access the project in PlanWell; however this activity does not automatically feed into the BSR. If a recipient indicates that they ordered plans or you see their order in your PlanWell order history, you may manually change this to “yes” by clicking on the “plans ordered” link.

APO – For any recipients assigned an APO, you will see an “APO Order” link in this column. For recipients that respond “yes” this process is automatically updated on the BSR. By clicking on the “APO Order” link you will be presented with the details of that order.

Once the recipient indicates “yes” to bidding or you manually make that entry for them, the order will be placed and a second “View Orders” link will appear in this column. You may click on this to view the final order details. For recipients that respond via Fax or Phone, you can generate a manual APO order for the bidder by clicking on the appropriate link on the BSR.

Minority – Any minority classifications assigned to a recipient will be listed in this column.

Awarded - As you determine who you are awarding the project to, you may click on the “awarded” link to change the default “no” to “yes.”

Additional BSR Options:

Customize this page - You may customize which columns are viewable and which are not by selecting “Customize this Page ...” in the upper left corner. Once opened, you may place checks in the boxes next to the columns you like to have viewable and clear the checks in the boxes next to those you would not.

Refresh Page – you may update the information presented in the BSR by clicking on “Refresh Page.” This will pull in any new responses or actions by recipients.

Edit From Information – this option will allow you to update the “from information” for the broadcast. Any additional broadcasts sent based on this one will show the updated information.

Print and Export – you may view, export or print a BSR report by clicking on “Print and Export”. You may select if you would like to sort the report by company name or CSI. Sorting by company name would list the broadcast recipients in alphabetical order by company name while sorting by CSI would group the all recipients of each CSI trade together, allowing you to quickly determine how many individuals per trade the broadcast was sent to.

After making your sort selection, choose [View Report]. You may view the report on screen or you may use the appropriate link to print or export the report.

Project Details – this will return you to the project details screen

Completed Broadcasts - clicking on [Completed Broadcasts] will bring you back to the main completed broadcast screen where you may select a different broadcast to view or click on the incomplete broadcast tab

Project Home – clicking on [Project Home] will bring you into the main project page in PlanWell Enterprise

Resend as New – by choosing [Resend as New] you will have the opportunity to resend the broadcast to all initial recipients along with the same APO settings. This option may be used if there was a change to the project details, from information or any of the packages initially included in the APO.

After selecting this option, you will first set if the new broadcast will use updated project details or from information (“use the most current master record for project & bid information”) or if it will use the original details (“use the historical project & bid information from the current broadcast”).

Next you will indicate which of the original recipients are to receive this new broadcast. This allows you to remove any recipients from the broadcast who have been removed from your address book since the original broadcast was sent.

Indicate if the APO settings will remain as they were with the original broadcast and choose [Click OK to Continue]. You will be brought into the standard broadcast creation screen with all details from the first broadcast populated. You may name the broadcast, make any necessary changes and launch the broadcast.

Broadcast Name – you can scroll through all completed project broadcasts by using the dropdown box in the “Broadcast Name” section. This allows you to quickly scroll between multiple broadcasts without returning to the completed broadcasts window between each. This option also allows you to View All which will combine all broadcasts into one viewable report.

New Group Name – As you use the different search, sort and filter options, the recipient list presented will adjust accordingly. You may create a group from any of these lists by typing in a group name and choosing [Save As Group]. This will allow you, for instance, to create a group of everyone who was awarded the project or everyone who said yes for bidding the project.

Search and Filter Options – You may complete searches based on company name, contact name, CSI code or CSI description by typing in the search term, using the dropdown box to indicate which option you are basing it on and selecting [Go].

You may also filter your recipient list by selecting the desired filter and selecting [Go].

Resend Email/Fax/Email & Fax – You may resend an email, fax or both for any recipient by selecting the recipient and clicking on the desired option to resend. This allows you to resend the broadcast to anyone with a failed message for the email or fax

All Emergency Stop – This option allows you to immediately stop any emails or faxes not yet in the process of sending or already sent. This is most commonly used if there is an error discovered in the broadcast, broadcast attachments or project. As mentioned, this will only stop emails and faxes that have not begun transmitting. Click [All Emergency Stop] and [OK].

Add Recipients to Broadcast – there will be times that you will want to send the exact same broadcast to new recipients. For example, you may want to include new subcontractor you have just added to your address book, or you see that you are not receiving many “yes” responses in a specific trade and want to expand who you invite. Rather than creating a new broadcast that you try to match up to the original, you may click [Add Recipients to Broadcast] to select these new recipients and send them the exact same broadcast. An advantage of this option is that you can track all activity on one BSR rather than two or more.

Click on [Add Recipients to Broadcast] and click [Add New Recipients]. You will be presented with your address book where you can use all the previously discussed methods for selecting the new recipients. All recipients selected will be gathered in the “View Selected Recipients” tab. Choose [Save and Return]. The newly selected individuals will be listed in the Add new Recipients window; choose [Send Broadcast for Selected Users]. You will be returned to the BSR where you will be able to see the new recipient added to your original list.

Note: When selecting individuals to add to a broadcast, those included in the original broadcast will not be available for selection.

Configure Post APO – after a broadcast is sent or you have added an individual to a broadcast, you can choose to add an APO for them. Using our example above, of not having enough bidders in a specific trade, assigning an APO may encourage more recipients to bid.

Click on the individual(s) and choose [Configure Post APO]. All packages included in the original APO's will be listed. Choose the printing options and specify the quantity and delivery details as you did the original APO. You will have an additional option to place the order now or place the order later. By choosing "Place Now" you will bypass the need for the recipient to respond "yes" to trigger the order. You will select this option when the recipient has already responded previously. By choosing "Place Later" the recipient will have to indicate "yes" to bidding to trigger the order.

Deactivate Users – once a broadcast is sent and received, you have provided the recipient with a powerful tool to access your private project online through the link in the email. By choosing [Deactivate User] you can cut off the project access to the selected individual through the email broadcast. Further, the individual will no longer have the ability to indicate their interest in bidding the project.

Incomplete Broadcasts – every time you choose "Start a Broadcast" BidCaster begins creating that broadcast. The Incomplete Broadcast tab will list any broadcasts started but not completed. In some cases these are broadcasts that you saved with the intention of completing later; in other cases these are broadcasts you stopped working on for various reasons and do not intend to complete.

In the case of a broadcast you would like to finish, click on the broadcast name. You will be brought to the point of the broadcast last worked on. You may complete the remaining broadcast processes and launch the broadcast.

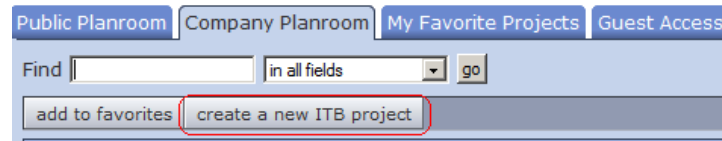
Virtual Projects

As mentioned in the introduction to this document, BidCaster not only allows you to send broadcasts but also to create new ITB projects. This allows you to build the project foundation – or shell – that your reprographer will then add project documents to later. Until documents are posted into this project shell, it can only be used by you for BidCaster activity.

With the proper permissions, after logging into PlanWell, you will have the option to create a new ITB project.

Planroom > Company Planroom

Click on a project to view project details:



After making this selection, you will be brought into an empty project details screen where you will need to indicate all project details such as project name, number, password, timeline, description, address, bid due date, walk through date, plan return date deposit amount, if the deposit is refundable and any bid instructions. You will notice that the “Plans Available” selection is set to “no.” As mentioned previously in this document, this is an automatic setting based on if the project has documents online.

After making all necessary settings, choose [Add Project]. You will now be able to set the default templates that will be used and send a broadcast if desired.

It is important to note that if you send a broadcast prior to documents being available, recipients will be allowed to access PlanWell, but they will only be able to view project details since there are no plans posted. Any broadcasts sent at this point should be simply announcing that a project bid invitation is pending.

Reports

At any time, you may view reports on any billable activity done within BidCaster as well as a more detailed report of all activity done within BidCaster. These reports allow you to quickly match your invoice from the reprographer to the logged activity in BidCaster as well as keep tabs on monthly expenses.

Broadcast Billing Report – this report will provide you with activity based on a specific month or date range. You may further choose to group it by project or broadcast details.

When you first log into PlanWell, you will have the option in the upper right corner to click on “Broadcast Billing Report.”

The screenshot shows the Planroom interface with the 'Broadcast Billing Report' button highlighted in a red box in the top right corner. Below the navigation bar, there is a search bar and a 'show all projects' button. The main content area displays a table with the following data:

Project Number	Broadcasts	Project Name	Project Description
<input type="checkbox"/> SOC Project	[view broadcasts]	SOC Project	SOC Project
<input type="checkbox"/> 21346	[view broadcasts]	ITB Towers	ITB Towers
<input type="checkbox"/> 0118	[view broadcasts]	Plymouth Community Center	Plymouth Community Center
<input type="checkbox"/> 201	[view broadcasts]	Plymouth Creek	...

After making this selection, you may choose if you want a report for a specific month or you may click on the date range option and enter the beginning and end dates.

By default, the report will group the resulting data by project and broadcast details. The resulting report with these default options will list every BidCaster project with activity during the specified time and provide full details of each broadcast. You will receive a total of emails and faxes sent for each broadcast, a total for each project and a grand total for all projects.

If you would prefer to see just a breakdown by project, remove the check box for broadcast details. The resulting report will provide the total number of emails and faxes sent for each project and a grand total for all projects.

If you want to see the broadcast details and are not concerned with which project the broadcast was associated with, unselect PlanWell project. The resulting report will provide the total number of emails and faxes sent for each broadcast and a grand total for all.

As with all reports in PlanWell and BidCaster, the data can be printed or exported using the appropriate icons.

BidCaster Templates

BidCaster will allow you to create customized templates for a variety of purposes. Our template editor will allow you several ways to design a template that will mirror your company's individual identity, while automatically populating your project specific information. This user guide will outline basic template information. If you would like to view additional template editing and creation details, please download the BidCaster Advanced Template User Guide.

BidCaster includes a number of generic templates that may be used to complete standard BidCaster broadcasts and addenda announcements. To access these templates for review and/or customization, click on the "My Account" tab and the "Manage Templates & Attachment Files" tab.

As you review any of the templates, please be aware that text surrounded by brackets mark a merge tag. A merge tag is used to pull the data from the contact or project details. This saves you from manually typing in information for each recipient. For example, if you are sending a broadcast to 10 recipients, the "[To Contact]" merge tag will automatically populate the appropriate recipient name into each of the 10 broadcasts.

Broadcast Templates:

BidCaster has created four default templates for your use to send your initial broadcasts as well as addenda notifications.

Single Broadcast Default – This template will provide the recipients with all necessary information when announcing a new project and inviting the recipient to bid the project. All text included in this template is appropriate for an Invitation to Bid.

INVITATION TO BID NOTICE

To:	[To_Contact] [To_Company_Name] [To_Address1] [To_City], [To_State], [To_Zip]	Phone:	[To_Phone]
		Fax:	[To_FAX]
		Email:	[To_EMAIL]

From:	[From_Contact] [From_Company_Name]	Phone:	[From_Phone]
		Fax:	[From_FAX]
		Email:	[From_EMAIL]

Gentlemen:

Your firm has been invited to submit a bid for the following project.

Please download the following files, if applicable: **[Broadcast_Attachments]**

[POL_Message]

If you received this document only as a fax, please indicate your intention to submit a bid below and fax back to (enter fax number): YES: _____ NO: _____

The following plans will be provided to your firm upon receipt of a YES bid acknowledgment: **[BroadCast_APO]**

Please submit your bid based upon the following CSI phase codes: **[Price_CSI_Codes]**

Single AddendaNEW Default – This template will provide the recipients with information necessary to announce a project addenda.

Double Broadcast Default – As mentioned previously in this document, the original version of BidCaster required the use of two templates – or pages – to announce an invitation to bid. The first page acted as a cover page while the second page provided additional details and linked into PlanWell. When BidCaster was incorporated into PlanWell, this two page broadcast was no longer necessary. The double broadcast default templates remain in BidCaster for those customers who prefer to continue working in the original method.

The double broadcast default is the first page mentioned in this description. It will provide basic details on the project and a link to the Email Response Template - the second page mentioned above.

If you prefer to work within the simplified single templates, it is not necessary to make any adjustments to the double templates.

Double AddendaNEW Default – Like the double broadcast template, the double addenda template will act as the cover page announcing a project addenda. The template will include appropriate addenda notification text as well as the link to the second page – the Email Response Template.

If you prefer to work within the simplified single templates, it is not necessary to make any adjustments to the double templates.

Email Response Templates:

As mentioned above, the original version of BidCaster required the use of two templates, working together, to announce an invitation to bid or project addenda notice. The email

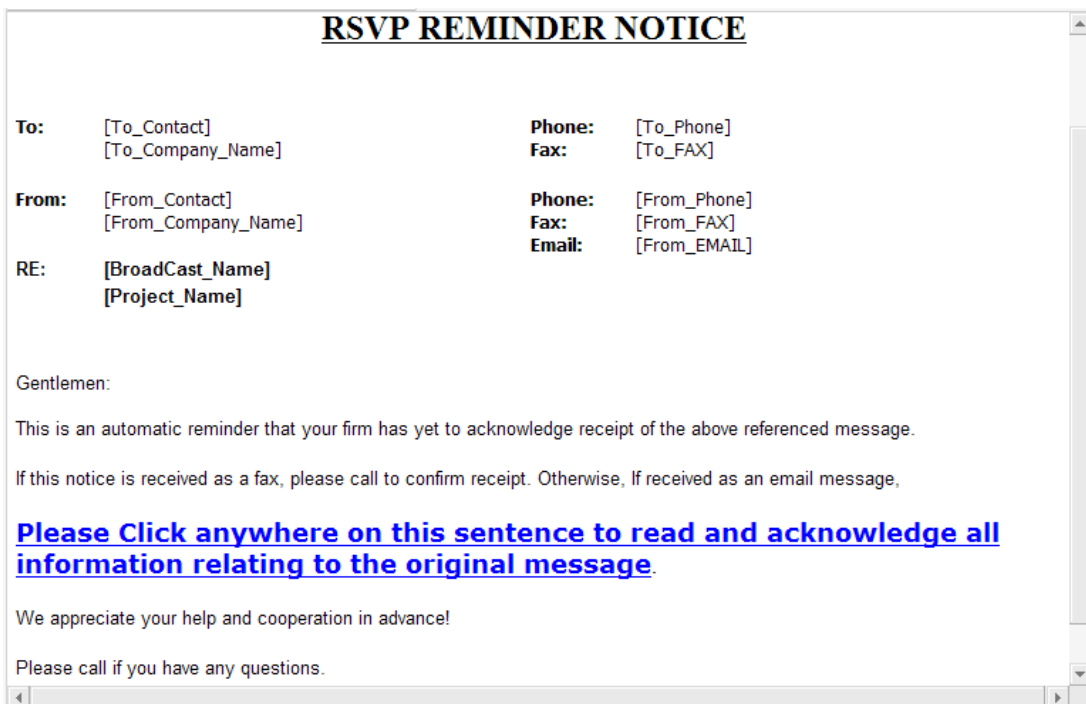
response template remains in BidCaster for those customers who prefer to continue working in the original method.

The email response template is the second page mentioned of this two page process. It will provide additional details on the project, the link to indicate if the recipient is going to bid the project and a link into the project in PlanWell.

If you prefer to work within the simplified single templates, it is not necessary to make any adjustments to the email response template.

Auto-Reminder Templates:

Auto-reminders are sent on a specific date and time to a recipient has not responded to a broadcast. The auto-reminder template contains the relevant information for this reminder.



Within each of the template category, you will have the ability to create new templates, customize existing templates, delete obsolete templates and, when necessary, restore the original default templates.

Adding a New Template

By selecting [Add], you will be brought into an empty template editor page where you can paste data from a word document or build the template from scratch. It is recommended that you download the BidCaster Advanced Template User Guide to review the process.

Editing a Template

By highlighting a template and selecting [Edit], the selected template will populate into the template editor. From here you may change text as desired. You can also easily replace the

BidCaster logo with your company logo. Begin this process by highlighting the BidCaster logo and then click on the “Image Manager” icon. Within the resulting Image Manager window, click on the “Upload Image” tab. Browse to your logo and choose “Upload.” Please note, the “Directory” listed is an automatic setting and should not be changed. Once the logo is uploaded, click on the “Browse Files” tab, highlight the newly updated logo and choose “Insert.” This will replace the BidCaster logo with your company logo.

As mentioned above, text surrounded by brackets are merge tags. Most merge tags that exist in the body of the template are required and should not be removed nor should the text within the brackets be reworded.

After all desired changes are completed, you will save these changes. By choosing [Save] or [Save & Exit] the existing template will be saved with your changes. By typing in a template name and choosing [Save As], you will save this as a new template while the original selected template will remain unchanged.

For more information on editing your templates, please download the BidCaster Advanced Template User Guide.

Deleting a Template

You may delete any obsolete template by highlighting the template and selecting [Del]. You will need to have at least one template per category.

Restore Default Templates

You may restore all of the default templates provided by BidCaster if they have been changed or deleted. It is important to note, this feature only applies to the templates provided by BidCaster. If you have added a new template or edited a template and saved it with a new name, the restore features will not apply.

After selecting [Restore Default Templates] you will have two options:

Restore Only Missing Default Templates – If you have deleted default templates and wish to restore those deleted templates, choose “Restore only missing default templates.” Any deleted templates will be restored in their original format.

Restore All (Overwrite Existing) Default Template – If you have edited a default template and would like to restore it to its original format, choose “Restore All (Overwrite Existing) Default Templates.” All templates will be returned to their original state.

It is important to note that all templates in that category will be restored to their original format. If you have edited multiple default templates and only want one restored, please contact your reprographer for assistance.

If you would like more information on templates, please download the BidCaster Advanced Template User Guide.