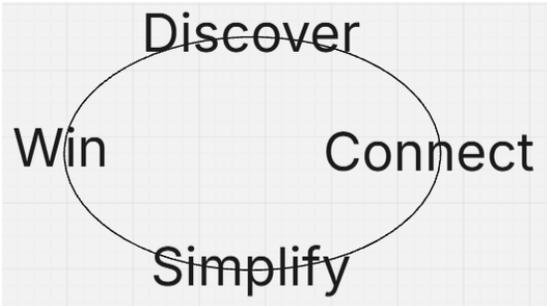


# PlanHub 2.0 How-To Outline/Voiceover Script w/ Visual Prompts

## Full Video + Breakaway Standalone Chapters

<p>PlanHub 2.0 logo</p> <p>Circle connects Discover, Connect, Simply, Win</p>  A diagram showing the PlanHub 2.0 logo. It consists of four words: 'Discover' at the top, 'Win' on the left, 'Connect' on the right, and 'Simplify' at the bottom. These four words are arranged in a square pattern and are enclosed within a thin black circle. The background is a light gray grid. <p>Discover</p> <p>Win</p> <p>Connect</p> <p>Simplify</p>	<p>The new PlanHub 2.0 helps you discover better projects, connect with general contractors, and simplify your precon process to win more bids!</p>
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### Section 1: How to Find Projects

#### 1.1. Project finder (independent video)

- Filters types and saving filters
- Search
- Quick project details overview

#### 1.2 Project details (independent video)

- Project files
  - Keyword search
  - Files per matching trade
  - File Viewer

- Highlighted words
  - Markup capabilities
  
- General contractors
  - Contact information
  - Send a message
  - Follow
  - Place bid
  
- Market Intelligence
  - Competitor activity
  - Filter by matching trades
  
- Q&A
  
  
- Material estimates

### 1.3 Mobile App ITB-Inbox (independent video)

You can also check incoming project notifications in your phone

## Section 2: Manage more projects in less time

At any time in your project discovery you can select a project and send it to your new bid board

### 2.1. Bid Board (independent video)

- Assign to team members
- Move to next stage
- Prepare takeoff

### 2.2. Takeoff & Estimation (independent video)

### 2.3. How to place a bid (independent video)

- Quick Bid
- Bid Builder - Templates
- Select general contractors
- Share my bid
- Preview
- Submit

## Section 3: Connect with General Contractors

### 3.1. Directory

- Search
- Filters

### 3.2. Connections tab

- Following

- In-network
- Imported

### 3.3. Network

- Team members
- Previous projects
- Interactions
- Notes
- Tasks

<b>Audio/Voiceover</b>	<b>Video</b>
“Discover. Connect. Simplify. Win. Welcome to PlanHub two point oh.”	Display “Discover” (fades out), “Connect” (fades out), “Simplify” (fades out), “Win” (fades out) and the PlanHub 2.0 logo
“Are you ready to learn how our all-in-one platform can help you find projects, create winning bids, and connect with general contractors? Let’s take a look.”	Clips of construction professionals on laptops, shaking hands after making a successful deal, high-fiving, etc
1.1	How to Find Projects with PlanHub 2.0 (maybe written on a chalkboard?)
PlanHub 2.0 provides the only tool you need to discover new projects posted directly by general contractors, Project Finder.	

<p>Here, you can quickly find projects that fit your business, thanks to our easy-to-use filters. Simply click on “filters”, and you can adjust your search by “trades”, “distance by miles or regions”, “bid due date”, “construction type”, and more options.. You can even save and access filters you previously created to save time on future searches.</p>	
<p>To search for projects using keywords, simply enter them into the search bar above. PlanHub will not only display the projects that include your keywords, but also show you how many times they appear in that project’s documentation, listing each document for you.</p>	
<p>Project details are easy to access. Click on the project listing you’re interested in learning about to bring up a project overview on the right. There, you’ll see helpful information like a brief project description, matching trades, project values, proposed schedules and more.</p>	
<p>1.2</p>	<p>How to Learn More About Projects with PlanHub 2.0 (maybe written on a chalkboard?)</p>
<p>PlanHub 2.0 includes all the files and information you need to learn more about projects and create winning bids. We make it easy for you to not only find the exact files you need, but review them, mark them up, and share them with your team.</p>	

<p>Click the “View project files” button under your projects listing to access a complete list of all available files for that job. If you’re looking for a keyword, type it in the search field and click the magnifying glass to pull up a list of the documents that contain it. Or, “search by matching trade” to narrow down to only documents that are relevant to your listed trades.</p>	
<p>Checkmark any documents from the list you’d like to download, and click on the appropriate button at the bottom of the screen.</p> <p>If you’d like to explore the file right on your screen, simply click on it, and you can see it, mark it up and even add signatures digitally with File Viewer. Select keywords will be highlighted in the doc, and you can easily add notes, images and comments that you can share with your team.</p>	
<p>Within a project listing, click on the “general contractors” tab at the top of the screen to see which GC’s are bidding on the project. You’ll see which GC’s are labeled as “Preferred”, as well as contact information and their planned bid schedule for this job. From here, you can easily message them through PlanHub, reach out to them using their contact information, place an immediate bid, or follow them to add them to your network.</p>	<p>Image should have at least 3-4 general contractor logos</p>
<p>If you want a competitive edge when bidding on projects, our robust “Market Intelligence” tool can help. Click on the “Market Intelligence” tab to easily see how often your competitors have reviewed or downloaded files from the project. Filter the results by matching trades for even more clarity - a great way to learn what you are up against so you can decide if the project is worth your time or adjust your bid accordingly.</p>	

<p>If you have questions for one or more of the general contractors bidding on a project, you can get them answered quickly by clicking the “Project Q&amp;A” tab. Just select which GC’s you want to contact from the drop-down menu, type in your question, attach up to three files if needed, click “send question” and get the response you need.</p>	
<p>Seeking out the best pricing for quality materials is a great way to put your best foot forward with every bid, and we make it easy with our “Materials Estimates” feature. Click on the tab above and PlanHub will automatically provide you with a list of suppliers customized to the project’s location and scope. Click “Select Trades” to narrow down to the suppliers who carry what you need, check off the ones you want to consider, and then click “request estimate” to instantly send a request to all of them. It’s that easy!</p>	
<p>1.3</p>	<p>How to Get Project Notifications Anywhere You Go with PlanHub 2.0 (maybe written on a chalkboard?)</p>
<p>If you want to take your work on the road, your home, or anywhere else you go, PlanHub Mobile’s brand-new ITB inbox is the perfect way to stay on top of new project opportunities. Here, you can receive and manage your “Invitations to Bid”, assign them to your team, review project details, and connect with general contractors, all from your mobile device.</p>	
<p>Receive and review each ITB card, tapping into it to reveal a project overview. Just like in the PlanHub platform itself, you can use the tabs above to access, search for, and mark up project files.</p>	
<p>Click the “general contractors” tab to see all of the general contractors bidding on the job.</p>	

<p>You no longer need to wait until you get to the office or power up your laptop to seize new opportunities. With ITB inbox, you can review ITBs, set new bids in motion, and keep your inbox clear and ready for new opportunities wherever you go.</p>	
<p>Section 2</p>	<p>How to Manage More Projects in Less Time with PlanHub 2.0 (maybe written on a chalkboard?)</p>
<p>The more quality projects you bid on, the more you can win. But half of the time, bidding and not following up is like not bidding at all. That’s why PlanHub 2.0 includes a brand-new, at-a-glance Bid Board, making it easy for you to manage your bids all the way to the finish line..</p>	
<p>2.1</p>	<p>Manage Your Bids in PlanHub 2.0 with Bid Board (maybe written on a chalkboard?)</p>
<p>Whether you’re discovering bidding opportunities using Project Finder or selecting them from ITBs sent to your inbox, you can easily add any project to your Bid Board from any screen - just click on the star.</p>	
<p>Click on “bid board”, where you can instantly see the updated status of all of your active bids. To zero in on the project you want to review or update, use the search or filters above the bid board to search by Team Member, Lead Source or Bid Due Date.</p>	
<p>Assigning a bid to anyone on your team couldn't be easier. Just click the symbol under the project’s value, select the team member you want, and click assign. They’ll be instantly notified and can get to work.</p>	

<p>Recently-added projects will appear under the “Saved Leads” heading. From there, it can be moved to different stages of the bidding process - estimating, bidding, won or loss. To change its status, you can either click on the 3 dots on top to use the drop-down menu or manually click and drag it to the column you want.</p>	
<p>You can even add projects that originated outside of PlanHub. Just click “import project,” enter the project information, add necessary documents and general contract information, and hit create. Just like that, your added project will appear on your bid board, ready for you to manage.</p>	
<p>2.2 Takeoff and Estimation</p>	<p>How to Perform Takeoffs and Estimations with PlanHub 2.0 (maybe written on a chalkboard?)</p>
<p>Takeoff by PlanHub is the ultimate time-saving tool for accurately measuring and calculating project needs and costs. Fully integrated with PlanHub 2.0, starting a takeoff is a breeze - simply click “Prepare Takeoff” right from any project on your bid board.</p>	
<p>In takeoff, you’ll see a list of projects you’ve saved or imported. Click on the one you want so you can access the attached project documents. You can find a particular one using the keyword search function. When you are ready to start a takeoff, just click on one of the project documents.</p>	
<p>Your project will open to a table of contents where you can view your plans at a glance.</p>	
<p>After selecting a plan page, you can start measuring your areas and linear distances. The toolbar at the bottom of the screen contains all of your primary takeoff tools like area, volume, and slope.</p>	

<p>First, set your scale by clicking on the scale button on the tool bar and adjusting the scale to match the plan.</p>	
<p>For quick measurements, use the ruler tool: left-click to start, drag your mouse, and release.</p>	
<p>To create a measurement, select your tool. For example, with the area tool, use 'two-point' for simple shapes or 'multipoint' for complex ones. Name your measurement, set any properties, and left-click to outline the area. Double-click to complete it and view the totals on the right.</p>	
<p>To save recurring measurements or share them with your team for future use, right-click on any measurement and choose "Save to Library." To access your saved measurements, navigate to the "Library" tab in the right-hand panel.</p>	
<p>To create an assembly, click 'Assemblies,' then 'Create Assembly.' Add a name, select the type, include cost items, and click 'F-x' to set a formula.</p>	
<p>From your takeoff, you can right-click on any of your measurements to send them to your assembly and estimate of choice. Verify displayed area totals and click "insert values," then click on the green pop-up banner to go to your estimate. Click the button for an expanded view, and you'll see everything there. You can add additional cost items right from this screen, or click "cost items library" to access or add preset items.</p>	
<p>Click 'Download' or 'Export' to share your estimate or takeoff and submit your bid.</p>	
<p>To seamlessly share your estimate with PlanHub's 'bid builder' tool, simply click 'send to bid builder' and create your proposal.</p>	

2.3	How to Submit Bids with PlanHub 2.0 (maybe written on a chalkboard?)
<p>Once the measuring and calculating for a project is done, it's time to create your bid. With PlanHub 2.0, you can either submit a "quick bid" or create one using one of our easy-to-use templates.</p>	
<p>You can get a bid started from various places in PlanHub 2.0, including your Bid Board. Click on the project you want, and click "submit bid" alongside the project name to access both options.</p>	
<p>To submit a quick bid, simply select your trade, enter your base bid amount, and include up to three accompanying documents. You can also type in a message to accompany your bid. From there, select the general contractors you'd like to share with, decide on the bottom whether you'd like your bid automatically shared with additional GC's if they get added to the project, hit submit, and your bid is on its way.</p>	
<p>If you prefer to build your bid from scratch, click "Create a cost breakdown" to reveal your "Bid Builder. Type keywords in the "select trade" box to find and select the trades you need, input items and costs, and create line items for your bid. You can edit, duplicate or delete each line item using the symbols to the right. Enter the appropriate tax amount at the bottom to automatically add that cost to your estimate. If you want to save this template to use in future bids, click "save to template". When you are ready to proceed, click "next"</p>	

<p>Select the general contractors you'd like to share your bid with, selecting whether you'd like your bid automatically shared with additional GC's if they get added to the project. Add any additional documents to your bid, hit submit, and your bid will be on its way.</p> <p>Finally, take a look at a preview of what the GC's you selected will see when they receive your submission. If you'd like to change anything, hit the "back" button and make your revisions. If not, hit submit. It's that easy!</p>	
<p>Section 3</p>	<p>How to Connect with General Contractors with PlanHub 2.0 (maybe written on a chalkboard?)</p>
<p>Now more than ever, networking is an important ingredient for success in the construction industry. That's why PlanHub 2.0 offers all the tools you need to build strong relationships with general contractors.</p>	
<p>3.1</p>	<p>How to Discover General Contractors with PlanHub 2.0 (maybe written on a chalkboard?)</p>
<p>To discover new general contractors to connect with, click on "Network," From here, you can easily search for new connections using PlanHub's signature keyword searches and easy-to-use filters. To better suit your search, use the drop-down on the right to display them based on "distance, "most active" or alphabetically. Clicking "follow" on any GC listing will automatically add them to your connections section, where you can manage your relationships with ease.</p>	

3.2	How to Make Connections with PlanHub 2.0 (maybe written on a chalkboard?)
<p>Click on Connections to go to the list of general contractors you've created. Here, you can filter through your list to find the GC you're looking for, or add new connections by clicking on the appropriate button. Enter the GC's email address to check and see if they are already listed in PlanHub. If they are, you can simply click "add connection." If not, click "create connection" and enter their information in PlanHub so you can add them to your list.</p>	
3.3	How to Build Stronger Relationships with PlanHub 2.0 (maybe written on a chalkboard?)
<p>PlanHub Network is a powerful new way to discover new general contractors and build valuable relationships with them, all while keeping you organized and informed.</p>	
<p>In Network, you can easily search for new general contractors to connect with by using keywords or filters. Click into any GC listing to access all the information you need about their business, plus additional contact info for other listed team members and any listed projects. Add personal notes or documents visible only to your team to help you stay informed and build your relationship.</p>	
<p>Click into any of your "connections" to review all the information you need to strengthen your relationship. On the left, get an at-a-glance look at the GC's company and information about all listed team members, including contact information.</p>	<p>Team members should have several names listed and the tab should be opened to show the value of the info.</p>

The various tabs on the right give you access to projects currently listed by the GC, a record of previous interactions with your company, and any notes you've added for yourself. For example how does this general contractor like to receive bids? In the tasks section, you can set reminders for yourself, or anyone on your team pertaining to that contact so you never miss a scheduled phone call, meeting, or birthday wish. PlanHub Network is the helping hand you need to keep your relationships strong.