GUIDE FOR SUBCONTRACTORS

1. **IMPORTANT...KEEP YOUR COMPANY INFORMATION CURRENT** – This will ensure that your GC's have all the information they need to invite you to bid.
   a. On the bottom right of your dashboard, you will see **Company Information**. Select **Edit**. You can return to the main menu at any time by clicking the Paskr logo on the upper left of your screen. Upload your company LOGO by clicking the box next to your company name.
   b. UPDATE YOUR COMPANY ADDRESS by clicking on it.
   c. Update your phone, fax or website by clicking on it.
   d. UPDATE TRADES that your company provides. This will ensure that you are invited to bid the appropriate projects. Click **Trades/Cost Codes** on the upper right of the company header. Click a trade on the left to add it to your profile. Click a trade on the right to remove it. To view the cost items included in each trade, click the + to the left of the trade name. If your company only offers a few cost items and you wish to add them individually, click **Add Individual Cost Codes** at the bottom.
   e. QUALIFICATIONS – Keep these current so you will bid the appropriate projects.
      i. WORKER'S COMP AND GENERAL LIABILITY – Keep your expiration dates current and upload copies of your certificates by clicking Update.
      ii. BONDING CAPACITY – Enter and upload documentation if applicable by clicking the +.
      iii. Other Qualifications – Keep this current so you will be invited to bid the appropriate projects.
   f. BILLING ADDRESS – This will default to your mailing address. Click to change if needed.
   g. LICENSES – Keep your business license and contractor license current.
   h. UPDATE EMPLOYEE INFORMATION by clicking on employee name. Be sure to indicate if this person should receive bid invitations or be awarded contracts.

i. DELETE AN EMPLOYEE by clicking the trash can to the left of their name.

j. ADD AN EMPLOYEE by clicking the + on the far right of the aqua bar. Be sure to indicate if this person should receive bid invitations or be awarded contracts.

2. **<u>INVITATION TO BID</u>**

a. You will receive an invitation via email from '*GC Company Name@*Paskr.com'. Save this email so that you can easily return to the PlanRoom to view documents and/or submit your bid.

b. After opening it, you may view project documents by following the blue 'Click Here to view project drawings and/or submit your bid' link or

c. Click the blue 'Yes, I intend to bid on this project.' or 'No, I will not be able to bid on this project at this time.' to respond. Responding 'yes' will take you to the PlanRoom where you can bid or view, print, or download drawings.

d. When you are ready to submit your bid, return to the original bid invitation email (you should be able to find it by searching your inbox for subject 'Invitation to Bid') and click on the blue 'Click Here…' link. The links will be active until the bid due date has expired.

e. VIEWING/DOWNLOADING THE BID DOCUMENTS – You can access the PlanRoom at anytime using the links in the bid invitation or by logging in, selecting the project and navigating to Filing Cabinet > PlanRoom. A help screen will be shown when entering any area of the PlanRoom to help you navigate. To close it click the X in the upper right corner. You can re-open tips at any time by clicking Turn Tips On at the right side of the red bar. You can move easily through drawings, specifications, addenda and photos by clicking the appropriate link in the red bar.

   i. Drawings

     1. There may be several categories of drawings, each under it's own aqua category bar.

     2. If the estimator has prepared bid packages there may be specifications tied to certain categories if the estimator has prepared bid packages. Hover 'Specifications' in the aqua bar to reveal. Click on the file to view, print or download it.

   ii. The following instructions apply to drawings, specifications, addenda and photos.:

1. View a file – hover the drawing row and click the paper icon at the left

2. Download files – Select individual files by clicking in the selection box. Select all files by checking the Select All box in the aqua bar. After you have selected the files you want to download, click Download in the aqua bar.

3. **<u>SUBMIT YOUR BID INTENTION</u>** by clicking YES, NO or MAYBE at the top of the screen

4. **<u>SUBMIT YOUR BID</u>** – When you are ready, return to the PlanRoom by clicking the link in the bid invitation email or by logging in, selecting the project, hovering filing cabinet and selecting **PlanRoom** or **Bid on Job**
   a. Click **BID NOW** at the top of the screen.
   b. Enter bid amounts and days to complete for all items you wish to bid on.
   c. Add any suggested alternates below the bid items
   d. Type or paste your exclusions in the box labeled 'Exclusions'
   e. Type or paste comments in the box labeled 'Additional Comments'
   f. You may upload a bid by clicking **Choose File** above the bid items but you must also fill in your bid amounts below.
   g. When you are finished, click **Submit Bid** in the orange bar.

5. **<u>FINDING A PROJECT</u>**
   a. After logging in, projects are organized by status: Bidding, Pending, Will Start Soon, or In Progress. To view specific project information choose the status from the **Project Status** drop down.
   b. Click on the name of the project in blue.

6. **<u>UPON BID ACCEPTANCE</u>** - You will be notified via Webmaster at Paskr through email that you have been issued a Purchase Order or Subcontract to sign. Follow the blue link in the email to login and sign to accept. You may also view and print the purchase order or contract.

7. **<u>RESPONDING TO RFP's</u>**
   a. You will receive notification through email that there is an RFP for you to address. Follow blue link to log in and **view > price**.

   b. To correspond with project manager prior to pricing, click Send Email

8. **<u>SUBMITTALS</u>**
   a. To send electronic submittals in pdf format

      i. Click the link in the Submittal request from your GC or
      ii. Log into Paskr > select job status and job > **Filing Cabinet > Submittals**
      iii. Select the blue status text 'Pending' > **Browse** > select pdf from your hard drive > **Submit**
      iv. Select the submittal print date from the drop down box

9. **<u>RFI's</u>**
   a. Submitting

      i. You may submit an RFI to the project manager
         1. **Filing Cabinet > RFI** > Follow instructions on screen
   b. Responding to an RFI

      i. You will receive notification through email that your response is requested on an RFI.
      ii. Click on the blue link, 'Please RESPOND HERE'. This will not require a log in
      iii. Type your response in the text box > **Submit Response** > Select your name > Select whether the response is a comment or the official answer > **Click To Finish**

10. **<u>RESPONDING TO A CHANGE ORDER</u>**
    a. You will receive notification via Webmaster at Paskr through email that a change order has been signed by the project manager.

    b. Click on the blue link found in the email to login, view, respond to or sign the change order.

11. **SUBMITTING A PAY APPLICATION – Subcontractors only**

   Go to www.paskr.com/GC Company name to log in.

   a. **Project Status > In progress** > choose project > **Filing Cabinet > Billing**
   b. You must sign your subcontract and any change orders prior to submitting a bill
   c. If the GC has required, you will need to submit a schedule of values (Custom Billing) prior to submitting your first bill.
       i. **Click Here** > follow the instructions on the page. Note: **Schedule of Values is to include base contract amount only**. Change orders will be added to your billing as they are approved.
       ii. The project manager will be notified, will review, and approve or request modifications. You will be notified via email in any case.
   d. If the GC has required, you will need to submit a material vendors schedule of values sheet:
       i. **Click Here** > follow instructions on the page.
   e. **Add New Bill** > enter invoice number and bill amount under correct cost codes > **Preview New Bill**
   f. If needed, click **edit**. If correct click **submit**. Your bill will be reviewed and approved or declined for edit by the project manager. You will receive an email notifying of approval or request to edit.

12. **SUBMITTING A LIEN RELEASE**
   a. When your bill is approved, you will receive an email with a lien release attached. Open this attachment, print, sign and have notarized. Do not discard this email.
   b. Then scan your completed lien release and save to your hard drive.
   c. Return to the email and click the blue link to upload your lien release.
   d. Your lien will be reviewed and approved or declined. You will be notified via email either way.
   e. You may submit your next bill as soon as your prior lien release is approved.

13. **REQUIRED DOCUMENTS (viewing, printing, and importing)**
    a. Required Documents are additional forms that your General Contractor is requiring to be filled out. Examples: W-9 Form, Insurance Forms, Safety Policy, Drug Policy, etc.
    b. To access Required Documents you will need your Username and Password to login in to your GC's Paskr website. Login and go to **Project Status > In Progress > Click on Job Name > Filing Cabinet > Required Documents**
    c. Click **View** to open up a PDF copy of the document. You will need to print this document, fill out the form or sign the form, scan it, and Import it back into the Required Documents page by clicking on **Import & Send**.
    d. **Import & Send** opens up an email window. You will see Import File with a **Browse or Choose File** button for you to search your hard drive for the file. Once you select the file click **Open** which loads the file. You can then type any message you'd like for your GC, and then click **Send Email button** which has turned Red up on the Orange Tool Bar. You will do this for each Required Document.

14. **WARRANTY LETTERS**
    a. Warranty Letters will be sent during Project Close Out process. You will be sent a Notification Email to login to the GC's Paskr Website to View/Sign your Warranty Letter. There will be a CLICK HERE button in your notification email for you to click on to log in to Paskr to sign the Warranty.
    b. If you do not click on the email link, you will find your Warranty Letter by logging in, clicking on **Project Status>In Progress>Click on Project Name>Filing Cabinet>Warranty Letters>View/Sign**.

If you need assistance please call Paskr support at 615.212.3036