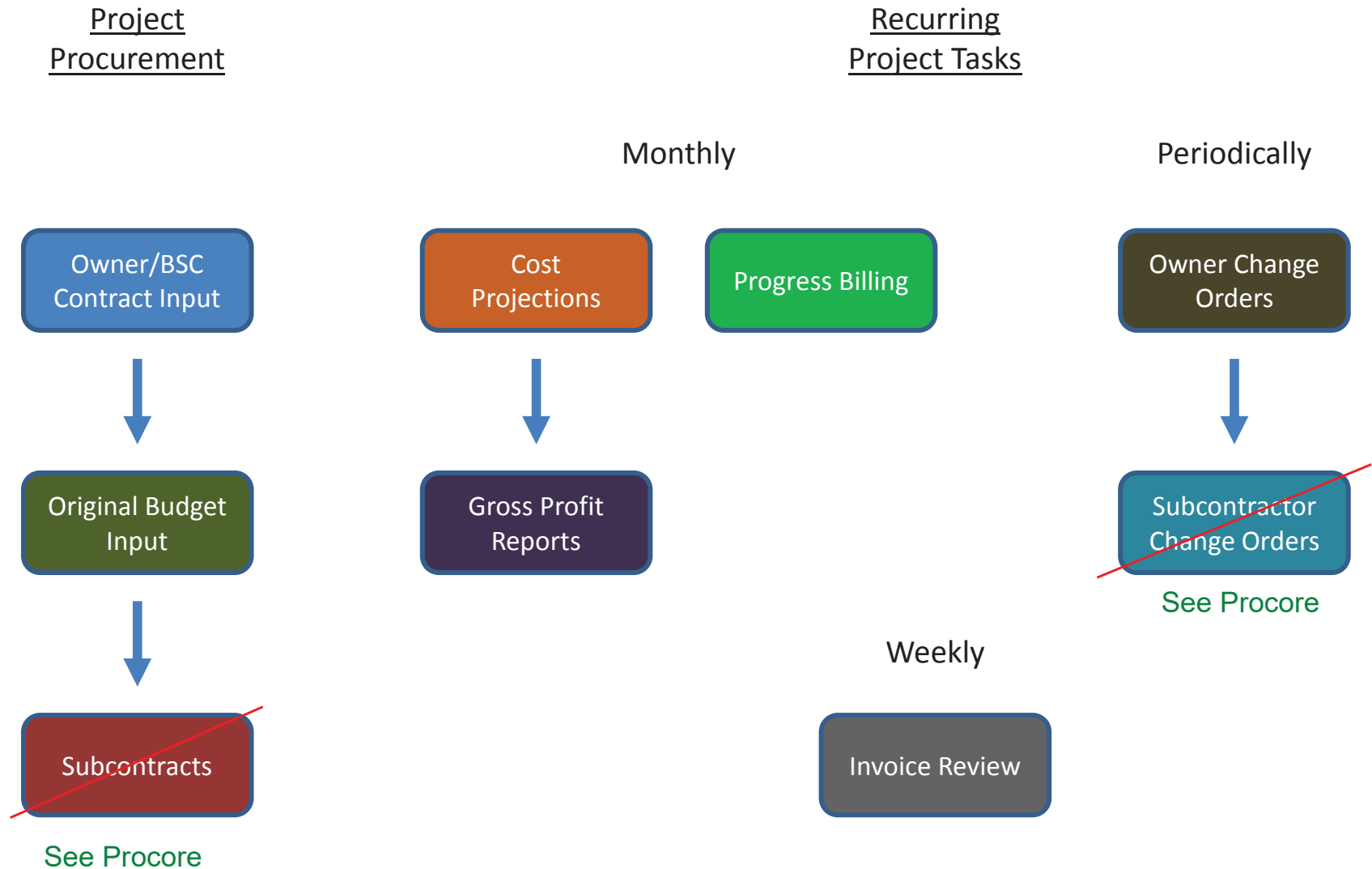


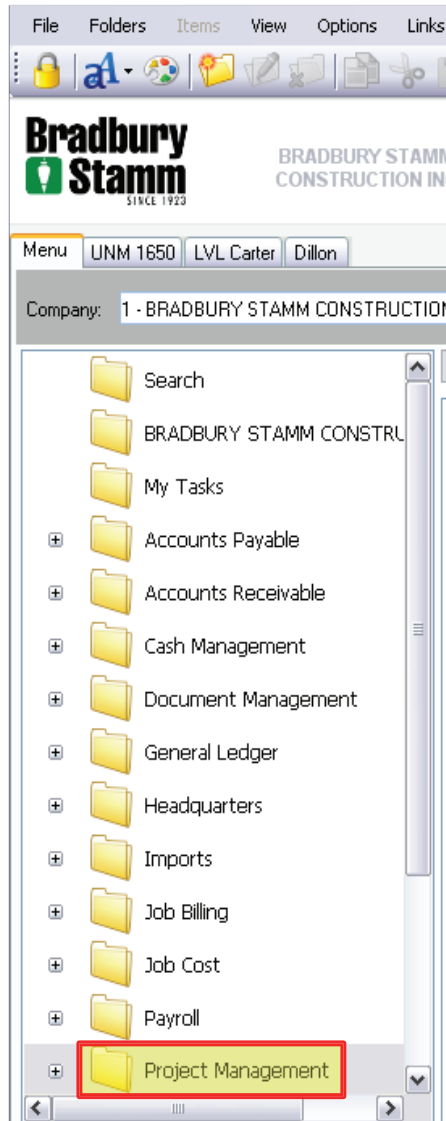


PROJECT MANAGER VIEWPOINT MANUAL

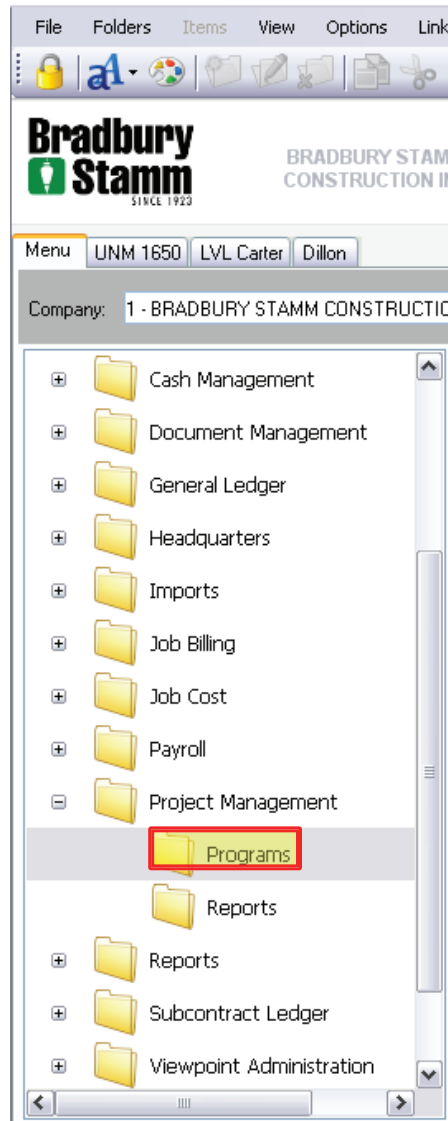




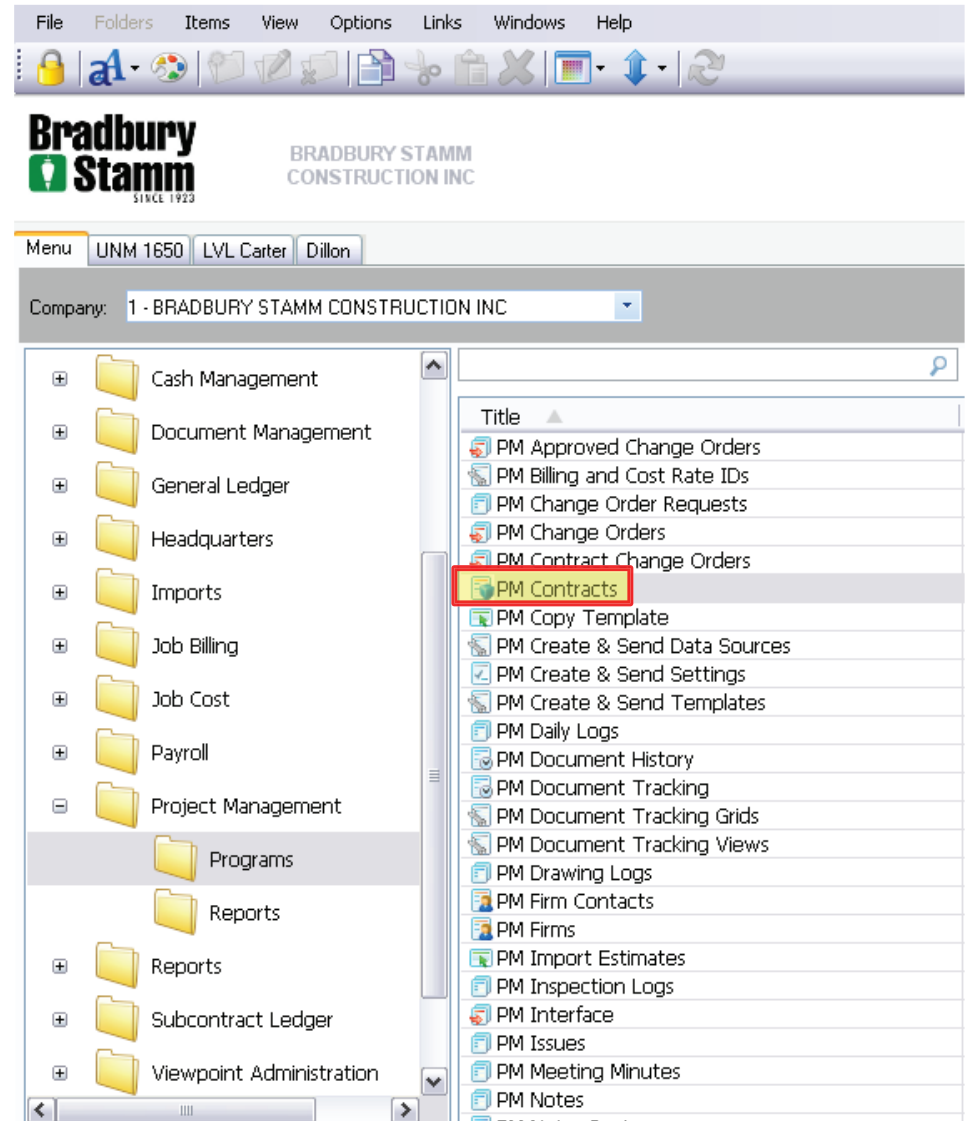
1. Locate and double-click
“Project Management”
from folder panel



2. Locate and single-click
“Programs” from the folder
panel



3. Locate and double-click “PM Contracts” from the item list





4. Locate and single-click "Grid"
from the upper tabs

File Edit Records View Options Tools Windows Help						
Contract: 1112.300 UNM HSC-3rd FI-Internal Medicine						
Grid	Info	Items	JB Info	JB Bill Notes	Notes	Forecast
Contract	Description					
1223.003	On-Call Primary Pump House 2 Scum Valve					
1223.004	On-Call MDC Tower Fall Prot Sys Repair					
1223.005	On-Call SJC Leak @ South Filter					
1223.006	On-Call SJC 8" Drain Line for Dewatering					
1223.007	On-Call SJC Leak Repair					
1223.008	On-Call Clarifier 6 Gate Repair					
1223.009	On-Call Dewater					
1301.	Grants HS Performing Arts Center					
1302.	Railyard Blacksmith Shop					
1303.	Buckman Photovoltaic					
1304.	NMSBVI-New Education Bldg					
1305.	Laguna Rainbow Village					
1307.	Concho West-Artesia Office & Hanger Improvements					
1308.	Springer Building Mixed Use					
1309.	ABQ Uptown Projects					
1310.	El Capitan Elementary - Roswell					
1311.	Capitan High School					
1312.	Estancia Middle School -Renov/Add					
1313.	SFCC Photovoltaic					
1314.	Dillion Hall Phase 2					
1315.	BCBS 4411 The 25 Way					
1316.	Atalaya Elementary Santa Fe					
1317.	Isleta Assisted Living & Elderly Care					
1318.	Albuq Convention Center Remodel					
1319.	JWLA - Renovation & Addition					
1320.	FCCH - Belen Remodel					
1321.	Manzano Day School-La Glorieta					
1322.	NMIMT Geology Building					
1323.	Chaves Cty Detention Ctr Reno/Addn					
1325.	Belen Eagles Natatorium					
33113.	Teacherages - Utilities					

5. Scroll down to look for your job by
number under the "Contract" column.
Single-click your specific project

File Edit Records View Options Tools Windows Help						
Contract: 1314. Dillion Hall Phase 2						
Grid	Info	Items	JB Info	JB Bill Notes	Notes	Forecast
Contract	Description					
1223.003	On-Call Primary Pump House 2 Scum Valve					
1223.004	On-Call MDC Tower Fall Prot Sys Repair					
1223.005	On-Call SJC Leak @ South Filter					
1223.006	On-Call SJC 8" Drain Line for Dewatering					
1223.007	On-Call SJC Leak Repair					
1223.008	On-Call Clarifier 6 Gate Repair					
1223.009	On-Call Dewater					
1301.	Grants HS Performing Arts Center					
1302.	Railyard Blacksmith Shop					
1303.	Buckman Photovoltaic					
1304.	NMSBVI-New Education Bldg					
1305.	Laguna Rainbow Village					
1307.	Concho West-Artesia Office & Hanger Improvements					
1308.	Springer Building Mixed Use					
1309.	ABQ Uptown Projects					
1310.	El Capitan Elementary - Roswell					
1311.	Capitan High School					
1312.	Estancia Middle School -Renov/Add					
1313.	SFCC Photovoltaic					
1314.	Dillion Hall Phase 2					
1315.	BCBS 4411 The 25 Way					
1316.	Atalaya Elementary Santa Fe					
1317.	Isleta Assisted Living & Elderly Care					
1318.	Albuq Convention Center Remodel					
1319.	JWLA - Renovation & Addition					
1320.	FCCH - Belen Remodel					
1321.	Manzano Day School-La Glorieta					
1322.	NMIMT Geology Building					
1323.	Chaves Cty Detention Ctr Reno/Addn					
1325.	Belen Eagles Natatorium					
33113.	Teacherages - Utilities					

6. Locate and single-click "Info" from
the upper tabs

File Edit Records View Options Tools Windows Help						
Contract: 1314. Dillion Hall Phase 2						
Grid	Info	Items	JB Info	JB Bill Notes	Notes	Forecast
Contract	Description					
1223.003	On-Call Primary Pump House 2 Scum Valve					
1223.004	On-Call MDC Tower Fall Prot Sys Repair					
1223.005	On-Call SJC Leak @ South Filter					
1223.006	On-Call SJC 8" Drain Line for Dewatering					
1223.007	On-Call SJC Leak Repair					
1223.008	On-Call Clarifier 6 Gate Repair					
1223.009	On-Call Dewater					
1301.	Grants HS Performing Arts Center					
1302.	Railyard Blacksmith Shop					
1303.	Buckman Photovoltaic					
1304.	NMSBVI-New Education Bldg					
1305.	Laguna Rainbow Village					
1307.	Concho West-Artesia Office & Hanger Improvements					
1308.	Springer Building Mixed Use					
1309.	ABQ Uptown Projects					
1310.	El Capitan Elementary - Roswell					
1311.	Capitan High School					
1312.	Estancia Middle School -Renov/Add					
1313.	SFCC Photovoltaic					
1314.	Dillion Hall Phase 2					
1315.	BCBS 4411 The 25 Way					
1316.	Atalaya Elementary Santa Fe					
1317.	Isleta Assisted Living & Elderly Care					
1318.	Albuq Convention Center Remodel					
1319.	JWLA - Renovation & Addition					
1320.	FCCH - Belen Remodel					
1321.	Manzano Day School-La Glorieta					
1322.	NMIMT Geology Building					
1323.	Chaves Cty Detention Ctr Reno/Addn					
1325.	Belen Eagles Natatorium					
33113.	Teacherages - Utilities					



7. On the upper icon bar, **right-click** the paper-clip icon, then single-click “attachments”, then single-click “add attachment”. Upload the owner/BSC contract from your computer and then single-click “ok”. Once this is complete, input known project information into the open blank cells (red colored cells are required). When you are finished filling out required and known cells in this tab, locate and single-click “Items” from the upper tabs.

File Edit Records View Options Tools Windows Help

Contract: 1314. Dillion Hall Phase 2

Total Orig. Contract: 5,630,077.50

Total Curr. Contract: 5,798,366.26

Grid Info **Items** JB Info JB Bill Notes Notes Forecast

Description: Dillion Hall Phase 2

Department: 200 Commercial Dept

Customer: 1041

New Mexico School for the Deaf

Pay Terms: 30 Net 30th

Dflt Retainage %: 0.00% Bill Day: 25th

Status

Contract Status: 1-Open

Contract Start Month: 06/13

Month Closed:

Projected Completion Date: 6/16/14

Actual Close Date:

Taxes

Tax Code: 01-123 Santa Fe

☐ Interface Taxes

Default Bill Type

☒ Progress ☐ T & M ☐ Both ☐ None

Set WC Maximum Retention

☒ None ☐ Percent of Contract ☐ Maximum Amount

% of Contract: 0.00% Retainage Amount: 0.00

Max Amt by %: ☒ Incl Chg Orders in Max Ret %

Adjust Maximum Bill: C-Composite Percentage same on all Items

Days in Contract

Original: 309 Current: 322

Standard Item Codes

Std Region: ☐ Use Metric UM



8. However many pay application types are required by your owner, you can input them here. In this example, this owner required two separate pay applications. To create a first and/or a new item, select the open row indicated by the "*" symbol under column "Item". If it is your first item, type "1.00" into the empty cell, tab over to the right one column and type in an item description. In this example, the next item would be "3.00" since items "1.00" and "2.00" have already been input. **Note: For advanced users, a complete schedule of values for the project can be input here item by item.**

File Edit Records View Options Tools Windows Help

Contract: 1314. Dillion Hall Phase 2

Total Orig. Contract: 5,630,077.50

Total Curr. Contract: 5,798,366.26

Item	Item Desc	Description	Bill Description	Tax Code	Tax Code Desc	UM	Orig Units	Unit Price	Orig Amount	Start Month	Retainage %
1.00	Dillion Hall Phase 2	Dillion Hall Phase 2	Dillion Hall Phase 2	01-123	Santa Fe	LS	0.000	0.00000	5,357,445.00	06/13	0.00 %
2.00	Dillion Hall - Health Ser	Dillion Hall - Health Services	Dillion Hall - Health Services	01-123	Santa Fe	LS	0.000	0.00000	272,632.50	06/13	0.00 %
*											

9. Scroll over to the right to locate the "Orig Amount" column. In each item's respective cell, input each line item's amount. Note: If you are doing this for the first time and you only have one pay application type required, this amount would be the total contract amount. When complete, single-click the "save" icon and close the window. **Now interface this item by going to "PM Interface".**

File Edit Records View Options Tools Windows Help

Contract: 1314. Dillion Hall Phase 2

Total Orig. Contract: 5,630,077.50

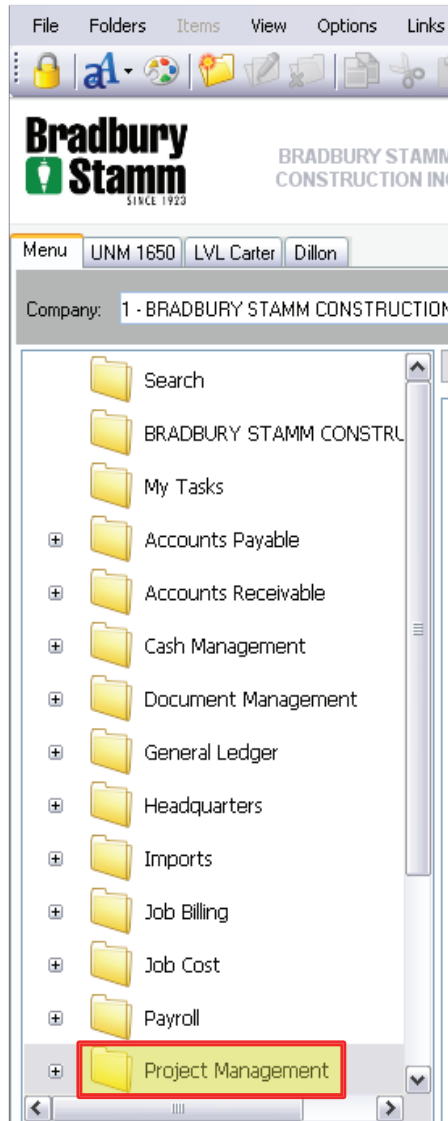
Total Curr. Contract: 5,798,366.26

Item	Item Desc	Description	Bill Description	Tax Code	Tax Code Desc	UM	Orig Units	Unit Price	Orig Amount	Start Month	Retainage %
1.00	Dillion Hall Phase 2	Dillion Hall Phase 2	Dillion Hall Phase 2	01-123	Santa Fe	LS	0.000	0.00000	5,357,445.00	06/13	0.00 %
2.00	Dillion Hall - Health Ser	Dillion Hall - Health Services	Dillion Hall - Health Services	01-123	Santa Fe	LS	0.000	0.00000	272,632.50	06/13	0.00 %
*											

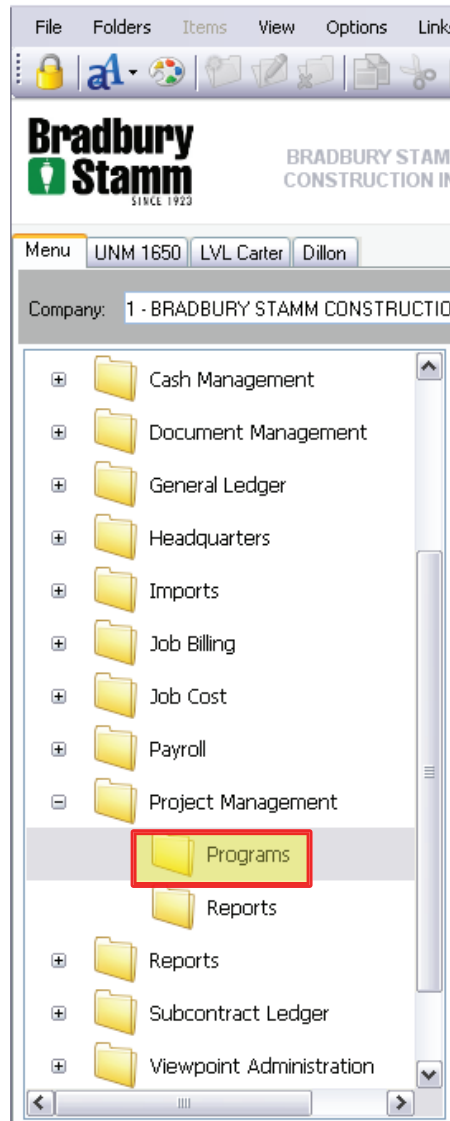
Original Budget Input



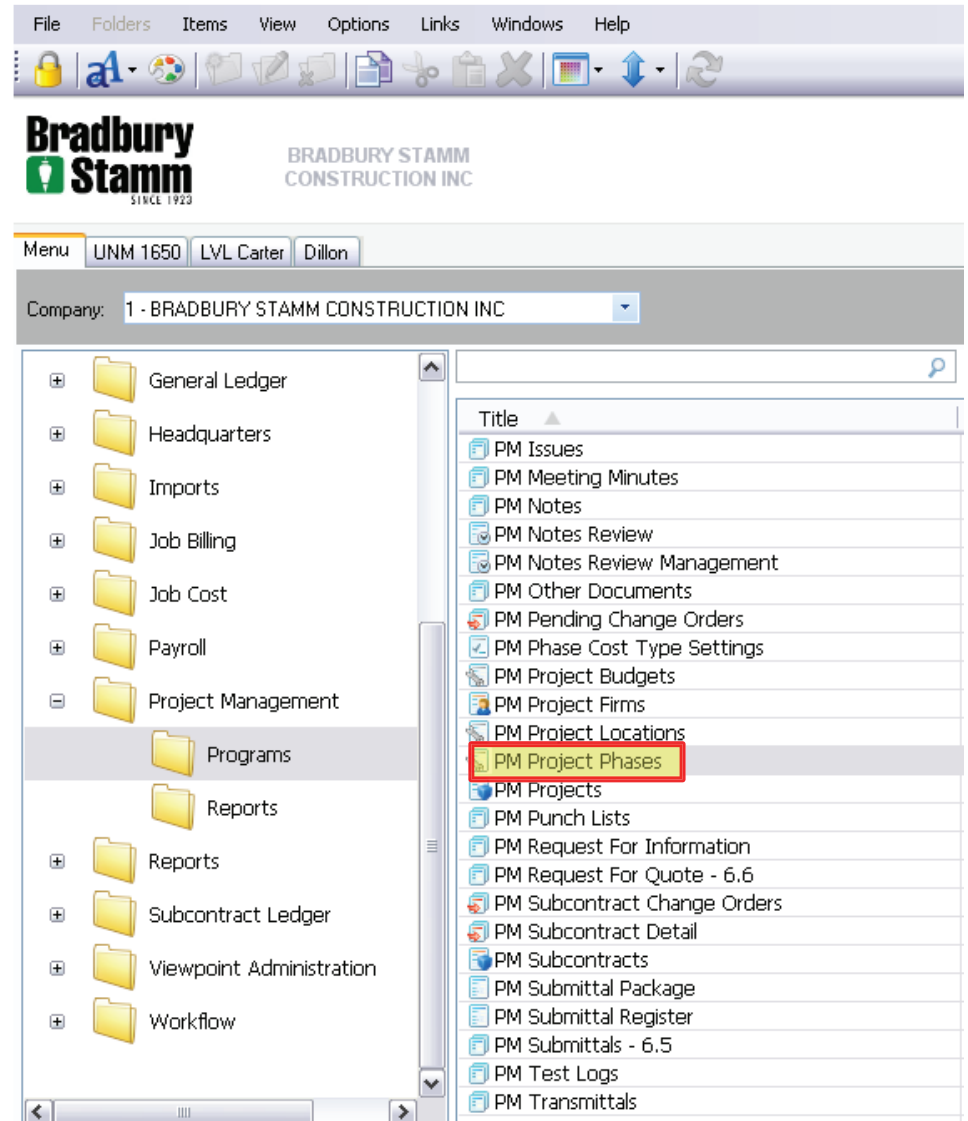
1. Locate and double-click
“Project Management”
from folder panel



2. Locate and single-click
“Programs” from the folder
panel



3. Scroll down, locate, and double-click “PM Project Phases”
from the item list. This will open up a new window.



Original Budget Input



6. Make sure option button “Phase Master is selected”. These are all of the available codes that BSC uses. Note that items beginning with “60.XXXX.” should not be used except for precon contract types.

Make sure if you are entering General Condition items, that they begin with “00.XXXX” unless told otherwise.

7. Locate and single-click your desired phase you want to add to apply a budget amount to.

8. Then click “OK”. This will close this small window (or you can double-click the item).

Phase Master Lookup

Select One:

☒ Phase Master

☐ Project Phases

Phase	Description
00.1000.	Project Manager - GC
00.1004.	Project Executive - GC
00.1008.	Asst. Project Manager - GC
00.1012.	Project Engineer - GC
00.1024.	Project Technician - GC
00.1040.	Senior Estimator - GC
00.1044.	Estimator - GC
00.1046.	BIM Coordination - GC
00.1048.	Project Superintendent Salary / Costs - GC
00.1052.	Project Superintendent Per Diem
00.1056.	Assistant Superintendent 1 - GC
00.1060.	Assistant Superintendent 1 Per Diem - GC
00.1064.	Assistant Superintendent 2 - GC
00.1066.	Assistant Superintendent 2 Per Diem - GC
00.1116.	Plans & Specifications - GC
00.1152.	LEED - GC
00.1156.	Permits - GC
00.1232.	Registered Survey - GC
00.1238.	Trucking and Hauling - GC

Setup OK Cancel

Phase Master Lookup

Select One:

☒ Phase Master

☐ Project Phases

Phase	Description
03.2000.	Concrete Reinforcing
03.2300.	Stressing Tendons
03.3000.	Cast In Place Concrete - Full Package
03.3001.	Cast-In-Place Concrete - Building
03.3002.	Cast-In-Place Concrete - Site Package Only
03.3005.	Concrete Encasement of Pipe
03.3100.	Concrete Collars / Cleanouts, etc.
03.3125.	Building Concrete Layout
03.3126.	Site Concrete Layout
03.3543.	Polished Concrete
03.3800.	Post Tensioned Concrete
03.4100.	Precast Structural Concrete
03.4500.	Precast Architectural Concrete
03.4800.	Precast Concrete Specialties
03.4813.	Precast Concrete Bollards
03.4816.	Precast Concrete Splash Blocks
03.4819.	Precast Concrete Stair Treads
03.5216.	Lightweight Insulating Concrete
03.5300.	Concrete Topping

Setup OK Cancel

Phase Master Lookup

Select One:

☒ Phase Master

☐ Project Phases

Phase	Description
03.2000.	Concrete Reinforcing
03.2300.	Stressing Tendons
03.3000.	Cast In Place Concrete - Full Package
03.3001.	Cast-In-Place Concrete - Building
03.3002.	Cast-In-Place Concrete - Site Package Only
03.3005.	Concrete Encasement of Pipe
03.3100.	Concrete Collars / Cleanouts, etc.
03.3125.	Building Concrete Layout
03.3126.	Site Concrete Layout
03.3543.	Polished Concrete
03.3800.	Post Tensioned Concrete
03.4100.	Precast Structural Concrete
03.4500.	Precast Architectural Concrete
03.4800.	Precast Concrete Specialties
03.4813.	Precast Concrete Bollards
03.4816.	Precast Concrete Splash Blocks
03.4819.	Precast Concrete Stair Treads
03.5216.	Lightweight Insulating Concrete
03.5300.	Concrete Topping

Setup OK Cancel

Original Budget Input



9. Your new phase item you created will be at the bottom-most grid item. Scroll to the right until you see column “Contract Item”. Hit function keyboard key “F4” and this will bring up the contract items you set up in the first section “Owner/BSC Contract Input”. Assign this phase code to the desired contract item. This will typically be contract item “1.00”. Continue adding phase items as outlined by steps 4 through 9 in this section. Once you are done adding these phase items single-click the “save” icon.

File Edit Records View Options Tools Windows Help

Grid

Project: 1212. La Vida Llana Rio Rancho Project Total: 0.00

Phase: 03.3000. Cast In Place Concrete - Full Package Phase Total: 0.00

Grid	Info	Cost Types	Notes	Roles	
Phase	Phase Desc	Description	Contract	Contract Desc	Contract Item
01.1272.	Temp Fire Protectio	Temp Fire Protection Extinguishers	1212.	La Vida Llana Rio R	1.00
01.1292.	Cellular Phones	Cellular Phones	1212.	La Vida Llana Rio R	1.00
01.1312.	Temp Fences - Con	Temp Fences - Construction	1212.	La Vida Llana Rio R	1.00
01.1328.	Dumpsters & Haul	Dumpsters & Haul off	1212.	La Vida Llana Rio R	1.00
01.1336.	Clean Up Labor/Go-	Clean Up Labor/Go-Fer	1212.	La Vida Llana Rio R	1.00
01.1404.	Final Cleaning Subc	Final Cleaning Subcontractor	1212.	La Vida Llana Rio R	1.00
01.1412.	Project ID Signs	Project ID Signs	1212.	La Vida Llana Rio R	1.00
01.1416.	Field Office Rental	Field Office Rental & Set Up	1212.	La Vida Llana Rio R	1.00
01.1420.	Field Storage Traile	Field Storage Trailer(s)	1212.	La Vida Llana Rio R	1.00
01.1428.	Office Supplies	Office Supplies	1212.	La Vida Llana Rio R	1.00
01.1432.	Office Equipment	Office Equipment	1212.	La Vida Llana Rio R	1.00
01.1436.	Computer Equipme	Computer Equipment	1212.	La Vida Llana Rio R	1.00
01.1448.	Temp HVAC/Heat	Temp HVAC/Heat	1212.	La Vida Llana Rio R	1.00
01.1452.	Weather Conditions	Weather Conditions	1212.	La Vida Llana Rio R	1.00
01.1468.	Project Record Doc	Project Record Documents & As Builts	1212.	La Vida Llana Rio R	1.00
01.1476.	Warranties	Warranties	1212.	La Vida Llana Rio R	1.00
01.1480.	Small Tools & Repa	Small Tools & Repairs	1212.	La Vida Llana Rio R	1.00
01.1482.	Reproductions/Print	Reproductions/Printing	1212.	La Vida Llana Rio R	1.00
01.1484.	Fed-X & Postage Co	Fed-X & Postage Costs	1212.	La Vida Llana Rio R	1.00
01.1494.	AGC Dues	AGC Dues	1212.	La Vida Llana Rio R	1.00
01.1496.	Payment & Perform	Payment & Performance Bonds	1212.	La Vida Llana Rio R	1.00
01.1504.	Buildlers Risk Insur	Buildlers Risk Insurance	1212.	La Vida Llana Rio R	1.00
60.1000.	Project Manager - P	Project Manager - Precon	1212.	La Vida Llana Rio R	1.00
60.1008.	Assistant Project M	Assistant Project Manager - Precon	1212.	La Vida Llana Rio R	1.00
60.1040.	Senior Estimator -	Senior Estimator - Precon	1212.	La Vida Llana Rio R	1.00
60.1044.	Estimator - Precon	Estimator - Precon	1212.	La Vida Llana Rio R	1.00
03.3000.	Cast In Place Concr	Cast In Place Concrete - Full Package	1212.	La Vida Llana Rio R	

Original Budget Input



10. Once your phase codes have been created within your job and they have been assigned a contract item, single-click the phase you would like to assign a budget to. Once that phase is selected, single-click the “Cost Types” tab.

File

Edit

Records

View

Options

Tools

Windows

Help

Project:

1212.

La Vida Llana Rio Rancho

Project Total:

0.00

Phase:

03.3000.

Cast In Place Concrete - Full Package

Phase Total:

0.00

Grid

Info

Cost Types

Notes

Roles

Phase	Phase Desc	Description	Contract	Contract Desc	Contract Item
01.1204.	Testing	Testing	1212.	La Vida Llana Rio R	1.00
01.1238.	Trucking & Hauling	Trucking & Hauling	1212.	La Vida Llana Rio R	1.00
01.1240.	Safety Program	Safety Program	1212.	La Vida Llana Rio R	1.00
01.1252.	Temp Electrical Ser	Temp Electrical Service	1212.	La Vida Llana Rio R	1.00
01.1260.	Temp Lighting	Temp Lighting	1212.	La Vida Llana Rio R	1.00
01.1266.	Temp Water (Const	Temp Water (Construction)	1212.	La Vida Llana Rio R	1.00
01.1272.	Temp Fire Protectio	Temp Fire Protection Extinguishers	1212.	La Vida Llana Rio R	1.00
01.1292.	Cellular Phones	Cellular Phones	1212.	La Vida Llana Rio R	1.00
01.1312.	Temp Fences - Con	Temp Fences - Construction	1212.	La Vida Llana Rio R	1.00
01.1328.	Dumpsters & Haul	Dumpsters & Haul off	1212.	La Vida Llana Rio R	1.00
01.1336.	Clean Up Labor/Go-	Clean Up Labor/Go-Fer	1212.	La Vida Llana Rio R	1.00
01.1404.	Final Cleaning Subc	Final Cleaning Subcontractor	1212.	La Vida Llana Rio R	1.00
01.1412.	Project ID Signs	Project ID Signs	1212.	La Vida Llana Rio R	1.00
01.1416.	Field Office Rental	Field Office Rental & Set Up	1212.	La Vida Llana Rio R	1.00
01.1420.	Field Storage Traile	Field Storage Trailer(s)	1212.	La Vida Llana Rio R	1.00
01.1428.	Office Supplies	Office Supplies	1212.	La Vida Llana Rio R	1.00
01.1432.	Office Equipment	Office Equipment	1212.	La Vida Llana Rio R	1.00
01.1436.	Computer Equipme	Computer Equipment	1212.	La Vida Llana Rio R	1.00
01.1448.	Temp HVAC/Heat	Temp HVAC/Heat	1212.	La Vida Llana Rio R	1.00
01.1452.	Weather Conditions	Weather Conditions	1212.	La Vida Llana Rio R	1.00
01.1468.	Project Record Doc	Project Record Documents & As Builts	1212.	La Vida Llana Rio R	1.00
01.1476.	Warranties	Warranties	1212.	La Vida Llana Rio R	1.00
01.1480.	Small Tools & Repa	Small Tools & Repairs	1212.	La Vida Llana Rio R	1.00
01.1482.	Reproductions/Print	Reproductions/Printing	1212.	La Vida Llana Rio R	1.00
01.1484.	Fed-X & Postage Co	Fed-X & Postage Costs	1212.	La Vida Llana Rio R	1.00
01.1494.	AGC Dues	AGC Dues	1212.	La Vida Llana Rio R	1.00
01.1496.	Payment & Perform	Payment & Performance Bonds	1212.	La Vida Llana Rio R	1.00
01.1504.	Builders Risk Insur	Builders Risk Insurance	1212.	La Vida Llana Rio R	1.00
03.3000.	Cast In Place Concr				

Original Budget Input



11. From this tab screen you will add cost types and their associated amounts. Single-click the open cell next to the “*”. Hit function key “F4”. This will bring up the available cost type BSC uses. These are 1-Labor (BSC labor), 2-Burden (BSC burden), 3-Material (Material contracts), 4-Subcontract, 5-Equipment (InternalRentals), 6-Other (Gas, fuel, miscellaneous expenses), 7-Tax (NMGR). *Note, you will not use “7” typically unless it is for phase item “98.1000.” which will be the sum NMGR for your project.* Double-click the cost type you wish to assign.

File Edit Records View Options Tools Windows Help

Project: 1212. La Vida Llena Rio Rancho Project Total: 0.00

Phase: 03.3000. Cast In Place Concrete - Full Package Phase Total: 0.00

Contract Item: 1.00 General Conditions

Item UM: LS Item Units: 0.000 Item Unit Price: 0.00000 Item Amount: 0.00

Grid Info Cost Types Notes Roles

Cost Type	C-T	Abbr	Units	UM	Hrs/Unit	Hours	Cost/Hour	Unit Cost	Amount	Update	Interface Date	Notes
*												

Cost Types Lookup

Cost Type	Description
1	Labor
2	Burden
3	Material
4	Subcontract
5	Equipment
6	Other
7	Tax

Original Budget Input



12. Scroll to the right to column “Amount” and input your projects budget amount for that phase item’s cost type. In this example I would input my concrete subcontractor’s contract amount since I designated this as cost item “4-Subcontract”. If I have a budget for miscellaneous BSC concrete labor, burden, material, equipment, and/or other, I would add those cost types on this same screen and assign budget amounts to those as well. Repeat steps 10 through 12 of this section to input your whole budget. **Note: If you have one subcontractor doing several divisions (e.g. drywall, framing, stucco), DO NOT split up your budget for that one subcontractor into multiple phase items. Assign their total subcontract to only one cost type under one phase item. Their subcontract will be linked to this in a later section. Once your whole budget is input and all of your numbers add up to the estimate’s costs, interface these items under “PM Interface”. Note: If you find out you made mistakes after it is interfaced, you will have to do a budget revision. It is better just to make sure it is right the first time.**

File Edit Records View Options Tools Windows Help

Grid ▾

Project: 1212. La Vida Llana Rio Rancho

Project Total: 0.00

Phase: 03.3000. Cast In Place Concrete - Full Package

Phase Total: 0.00

Contract Item: 1.00 General Conditions

Item UM: LS Item Units: 0.000 Item Unit Price: 0.00000 Item Amount: 0.00

Grid
Info
Cost Types
Notes
Roles

Cost Type	C-T Abbr	Units	UM	Hrs/Unit	Hours	Cost/Hour	Unit Cost	Amount	Update	Interface Date	Notes
	4 SUB	0.000	LS	0.0000	0.00	0.00000	0.00000	0.00			

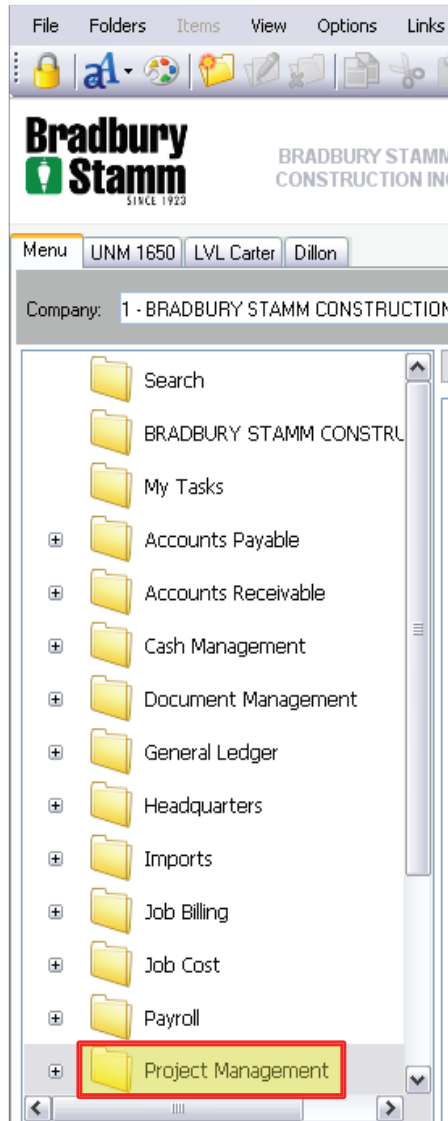
Initialize Cost Types
Subcontract Detail
Material Detail

End of Section

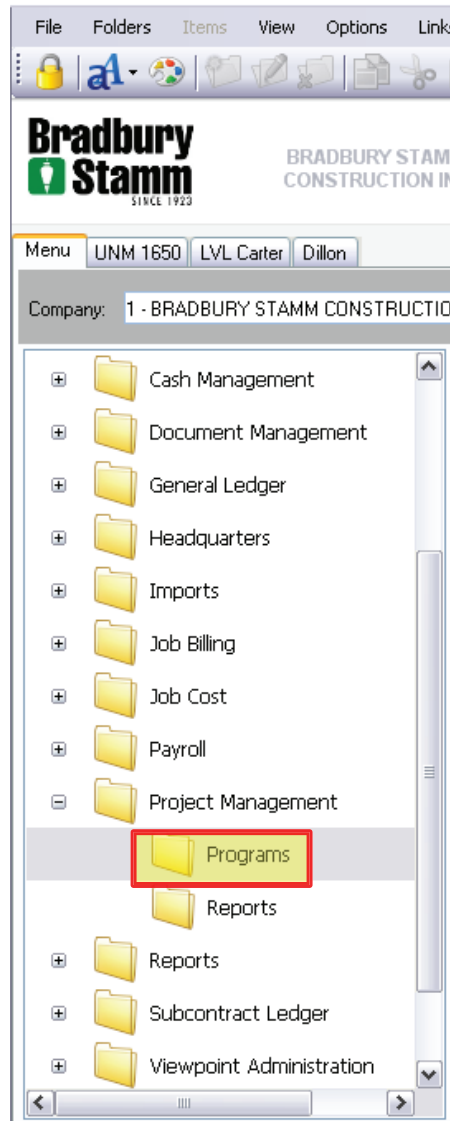
Subcontracts



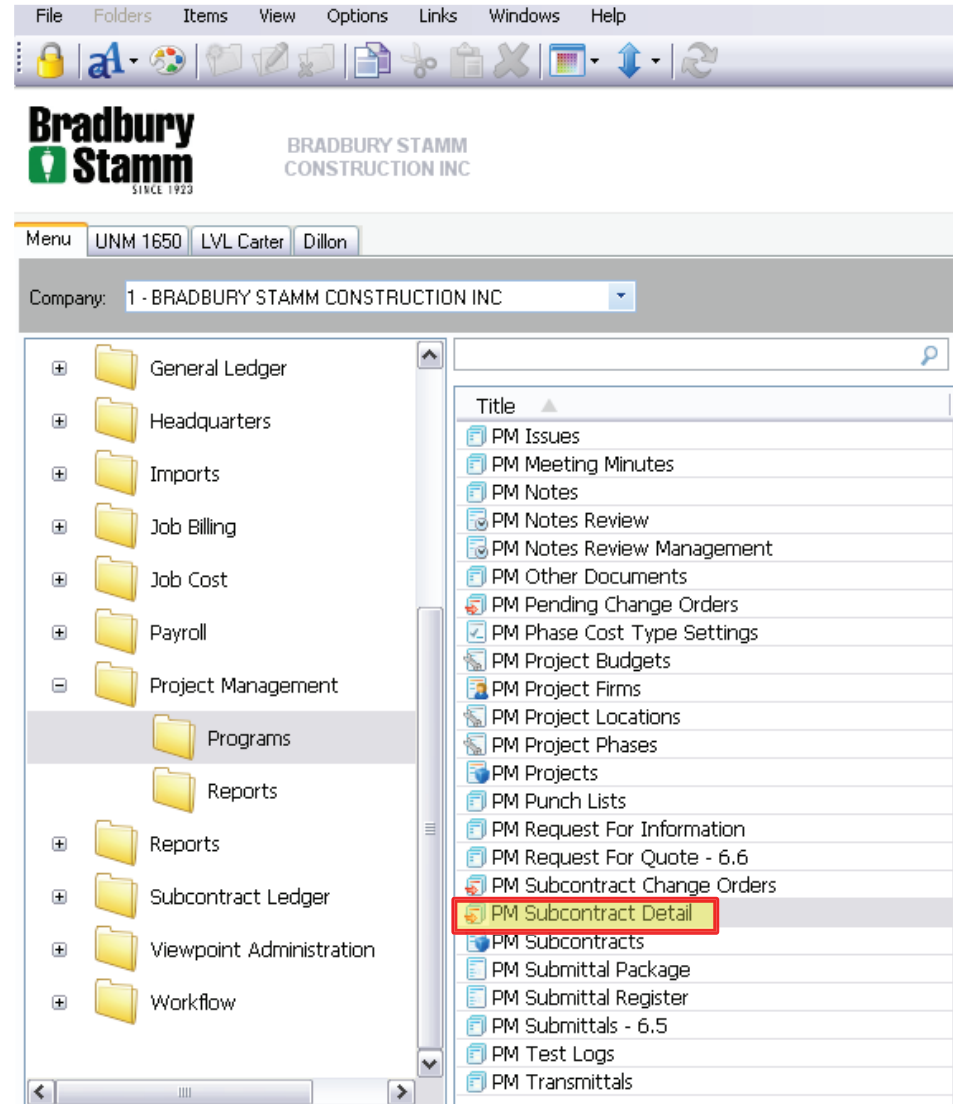
1. Locate and double-click
“Project Management”
from folder panel



2. Locate and single-click
“Programs” from the folder
panel



3. Locate and double-click “PM Subcontract Detail” from the
item list



Subcontracts



4. This will bring up a new window showing all non-interfaced cost coded budget phase items with designations 3-Material or 4-Subcontractor that were input during the earlier section “Original Budget Input”. In this screen you assign material contracts and subcontracts to vendors. Under the column “Vendor” single-click the empty cell next to the subcontract you wish to assign and hit keyboard function key “F4”.

File Edit Records View Options Tools Windows Help

Project: 1212. La Vida Llena Rio Rancho Record Type: O-Original Initialize

Original Estimate: Units: 0.000 UM: LS Unit Cost: 0.00000 Costs: 0.00

Non-Interfaced Interfaced

Phase	Cost Type	C-T Abbr	Sequence	Vendor	Vendor Name	Subcontract Number	SL Item	Amount	SL Item Type	SL Add-On	SL Item Desc	Add-On %	Units	UM
03.3000.	4	SUB	1					0.00	1 - Regular		Cast In Place Concrete		0.000	LS

5. A new window will appear. Within the name column blank cell, type the name of the subcontractor and select the correct company from the filtered results. If you find the vendor you would like to assign to the selected subcontract, single-click the “ok” button.

AP Vendors - Active or Temp Lookup

Select One:

☒ AP Vendors - Active or Temp

☐ Subcontract Vendors By Project

Vendor Name	SortName	Type	Active	Temp	Purchase Address	POCity	POState	POCountry	Payment Address
Intercon									
1348 INTERCON COMPANY LLC	INTERCON	R	Y	N					PO BOX 1464

Setup OK Cancel

- 5a. If you do not find the vendor you would like to assign the selected subcontract to, do the following. In this example I typed in “groundskeeper”, but no results are shown. If you type a “*” keyboard symbol before the name, this will search all words within the name. In the second image below it located “*groundskeeper” under their parent company name “Environmental Earthscapes”.

AP Vendors - Active or Temp Lookup

Select One:

☒ AP Vendors - Active or Temp

☐ Subcontract Vendors By Project

Vendor Name	SortName
groundskeeper	

Setup OK Cancel

AP Vendors - Active or Temp Lookup

Select One:

☒ AP Vendors - Active or Temp

☐ Subcontract Vendors By Project

Vendor Name	SortName
*groundskeeper	
3107 ENVIRONMENTAL EARTHSCAPES dba THE GROUNDSKEEPER	GROUNDSKEE

Setup OK Cancel

- 5b. If you still cannot locate the vendor you seek and you believe this may be the first time this vendor has worked for BSC, request a “W-9” from your vendor and give that to accounting so they can create a new vendor within viewpoint.

Subcontracts



6. Now that you have a vendor assigned to your item phase, single-click on the empty cell under column “Subcontractor Number”.

File Edit Records View Options Tools Windows Help

Project: 1212. La Vida Llena Rio Rancho Record Type: O-Original Initialize

Original Estimate: Units: 0.000 UM: LS Unit Cost: 0.00000 Costs: 0.00

Non-Interfaced Interfaced

Phase	Cost Type	C-T Abbr	Sequence	Vendor	Vendor Name	Subcontract Number	SL Item	Amount	SL Item Type	SL Add-On	SL Item Desc	Add-On %	Units	UM
03.3000.	4	SUB	1	1348	INTERCON COMPA			0.00	1 - Regular		Cast In Place Concrete		0.000	LS

7. Type in the subcontract or material contract number. For a subcontract this is typically “job number”-“phase”-S. For a material contract this is typically “job number”-“phase”-M. In this example this number would be “1212-03.3000-S”. Also type in the subcontract item amount.

File Edit Records View Options Tools Windows Help

Project: 1212. La Vida Llena Rio Rancho Record Type: O-Original Initialize

Original Estimate: Units: 0.000 UM: LS Unit Cost: 0.00000 Costs: 0.00

Non-Interfaced Interfaced

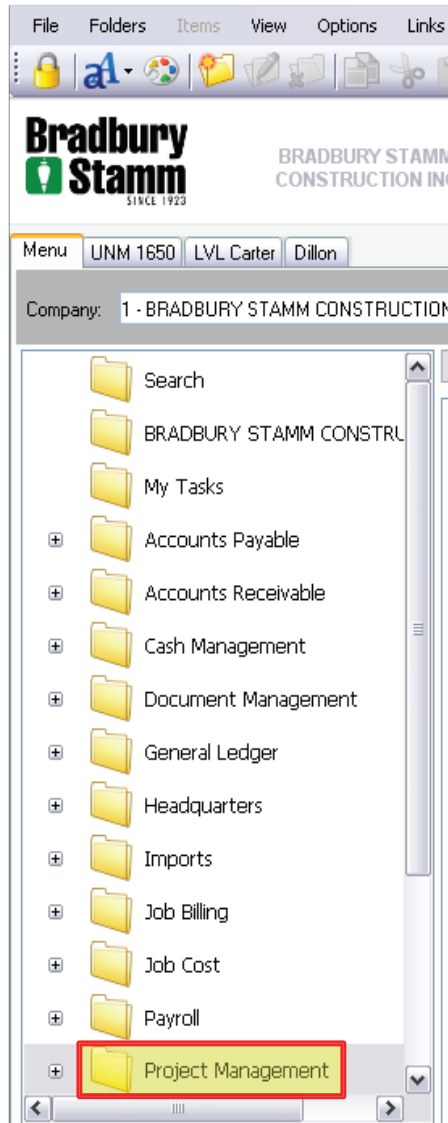
Phase	Cost Type	C-T Abbr	Sequence	Vendor	Vendor Name	Subcontract Number	SL Item	Amount	SL Item Type	SL Add-On	SL Item Desc	Add-On %	Units	UM
03.3000.	4	SUB	1	1348	INTERCON COMPA	1212-03.3000-S	1	0.00	1 - Regular		Cast In Place Concrete		0.000	LS

8. Repeat steps 4 through 7 for each of your subcontracts and material contracts.

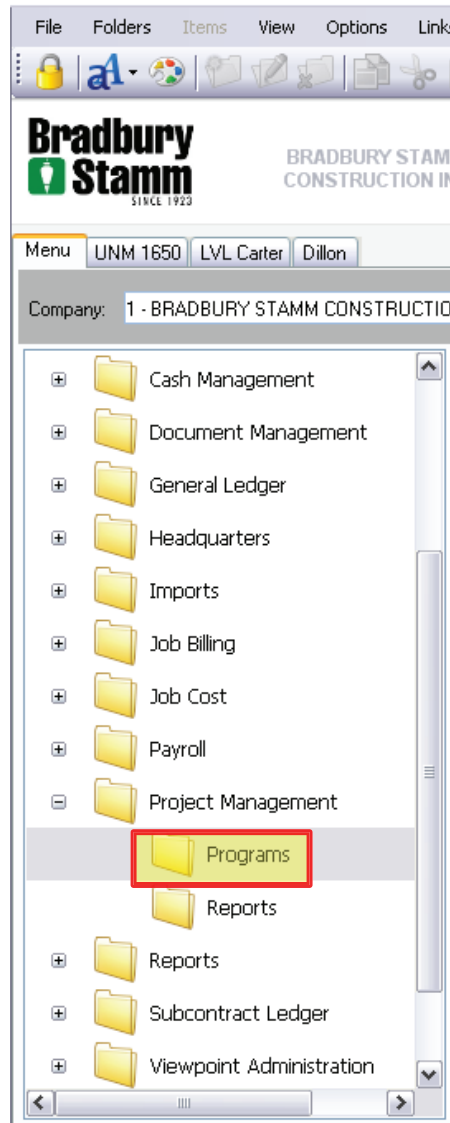
Subcontracts



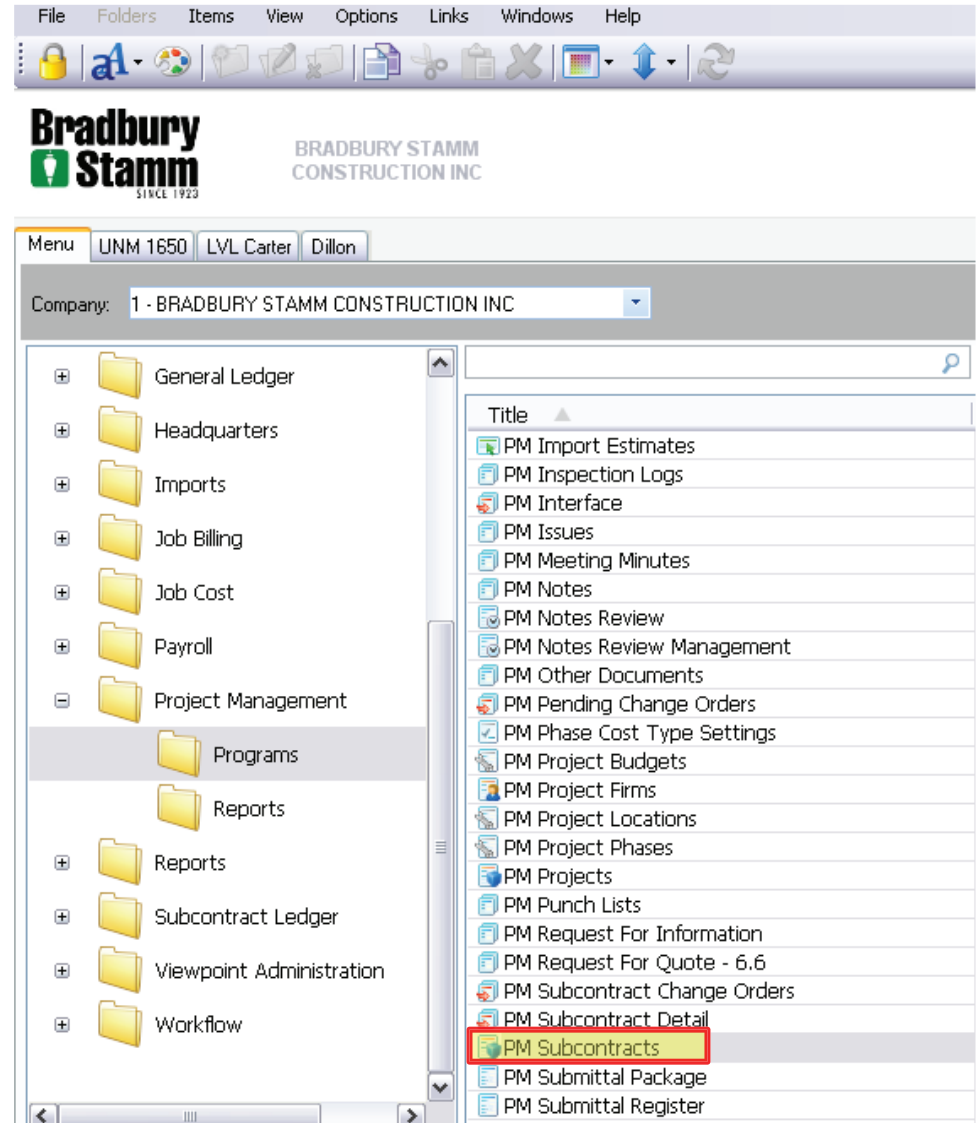
9. Locate and double-click
“Project Management”
from folder panel



10. Locate and single-click
“Programs” from the folder
panel



11. Locate and double-click “PM Subcontracts” from the
item list



Subcontracts



12. This will bring up a new window showing all the subcontracts and material contracts you have created. Select the contract you would like to generate and issue. Once that is selected, single-click the “Distribution” tab.

File Edit Records View Options Tools Windows Help

Grid

Project: 1212. La Vida Llena Rio Rancho Total Original: 0.00

Subcontract: 1212-03.3000-5 Cast In Place Concrete - Full Package Total Current: 0.00

Notice of Award Exhibit D

Grid Info **Distribution** Non-Interfaced Items Interfaced Items Inclusions/Exclusions Change Orders Notes

Subcontract	SL Description	Vendor	Vendor Name	Approved	Hold Code	Hold Code Desc	Pay Terms	Pay Terms Desc	Comp Group	Comp Group Desc	Total
1212-03.3000-5	Cast In Place Concrete - Full Package	1348	INTERCON COMPA	☐			35	Net 30 days	PRIV	Private Jobs	
*				☐							

13. On this screen double-click the empty cell under the “Responsible Person” column. Hit the keyboard function key “F4”

File Edit Records View Options Tools Windows Help

Grid

Project: 1212. La Vida Llena Rio Rancho Total Original:

Subcontract: 1212-03.3000-5 Cast In Place Concrete - Full Package Total Current:

Grid Info **Distribution** Non-Interfaced Items Interfaced Items Inclusions/Exclusions Change Orders Notes

Responsible Person	Resp Person Name	Send To Firm	Send To Firm Nam	Send To Contact	Contact Name	Notes

PM Firm Contacts - Active Lookup

Contact	Contact Name
1	Sal Mian
2	Frank Blea
3	Dave Burks
4	Tim Dingman
5	Tony Dorwart
6	Mike Drye
7	Sarah Elsbernd
8	Easton Hamblin
9	Stan Horton
10	Carlie Humphreys
11	Jim King
12	Dan Lyons

Setup OK Cancel

14. Locate and double-click your name from the “Responsible person” list.

Subcontracts



15. Next single-click the empty cell underneath the “Send To Firm” column. Hit the keyboard function key “F4”.

File Edit Records View Options Tools Windows Help

Project: 1212. La Vida Llena Rio Rancho Total Original: 0.00
 Subcontract: 1212-03.3000-5 Cast In Place Concrete - Full Package Total Current: 0.00

Grid Info Distribution Non-Interfaced Items Interfaced Items Inclusions/Exclusions Change Orders Notes

Responsible Person	Resp Person Name	Send To Firm	Send To Firm Name	Send To Contact	Contact Name	Notes
8	Easton Hamblin					

Firm Master Lookup

Select One:

- ☒ Firm Master
- ☐ All Active Firms
- ☐ Project Firms

Firm Name

Intercon

Intercon Company, LLC

Setup OK Cancel

16. This will bring up a small window. Type in and locate the subcontractor or material contractor “Firm”. Double-click your selection. *Note: “Firm” and “Vendor” are two different databases. In our instance, your “Firm” will be the same company as your “vendor”.*

17. Next single-click the empty cell underneath the “Send To Contact” column. Hit the keyboard function key “F4”.

File Edit Records View Options Tools Windows Help

Project: 1212. La Vida Llena Rio Rancho Total Original: 0.00
 Subcontract: 1212-03.3000-5 Cast In Place Concrete - Full Package Total Current: 0.00

Grid Info Distribution Non-Interfaced Items Interfaced Items Inclusions/Exclusions Change Orders Notes

Responsible Person	Resp Person Name	Send To Firm	Send To Firm Name	Send To Contact	Contact Name	Notes
8	Easton Hamblin	1370	Intercon Company,			

PM Firm Contacts - Active Lookup

Select One:

- ☒ PM Firm Contacts - Active
- ☐ Project Firm Contacts

Contact: Contact Name

1 Frank Lopez

Setup OK Cancel

18. This will bring up a small window. Double-click an available contact. *Note: If there is no contact available, you can create one. By single-clicking the “setup” button.*

Subcontracts



19. Now we are ready to generate the subcontract or material contract. Single-click the downward arrow to the right of the “envelope” icon above

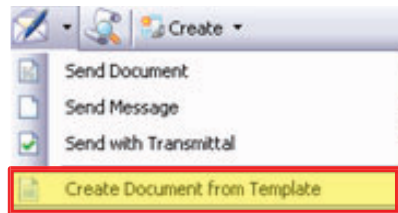
Project: 1212. La Vida Llena Rio Rancho Total Original: 0.00

Subcontract: 1212-03.3000-S Cast In Place Concrete - Full Package Total Current: 0.00

Buttons: Notice of Award, Exhibit D

Responsible Person	Resp Person Name	Send To Firm	Send To Firm Nam	Send To Contact	Contact Name	Notes	Send	Preferred Metho	Send Typ	Date Sent
8	Easton Hamblin	1370	Intercon Company,	1	Frank Lopez		☒	M - Print	To	

20. From the dropdown, single-click “Create Document from Template”



21. A new window will appear. Next to the words “Template:”, use the dropdown to locate you project’s template by job number and type of contract (material or subcontract). *Note: If your project is missing a template, ask the project tech to create them for you.*

Template: BSC 1004 Material Contract

Select Document Creation Type

☒ Attach Document to Parent

Attachment Name: BSC 1004 Material Contract.docx

☐ Save Generated Document

Generated Document: [] Save As...

☒ Open Created Document in Word

Buttons: Create..., Close

22. Once your template is selected, single-click the “Create...” button. This may take a minute to generate the custom word file.

Template: BSC 1314 Subcontract

Select Document Creation Type

☒ Attach Document to Parent

Attachment Name: BSC 1314 Subcontract.docx

☐ Save Generated Document

Generated Document: [] Save As...

☒ Open Created Document in Word

Buttons: Create..., Close

*Make sure you generate and distribute both the subcontract AND the subcontract package (partner document) during this step.

Subcontracts



23. A job specific word file will open on your computer. Items you input in earlier sections will automatically generate such as subcontract number, company name, company contact information, and subcontract amount. There are highlighted sections that need to be modified and updated by you such as the date, the scope of work, exclusions, and the writing out of the subcontract amount (remove highlights as you fill out). The subcontract format is based off of BSC standard contracts and the associated exhibits are created by the project tech and attached in the creation of your template by the office manager. [Note: If there are issues with your template that you do not want to correct for every single subcontract, contact the project tech to make those corrections.](#)



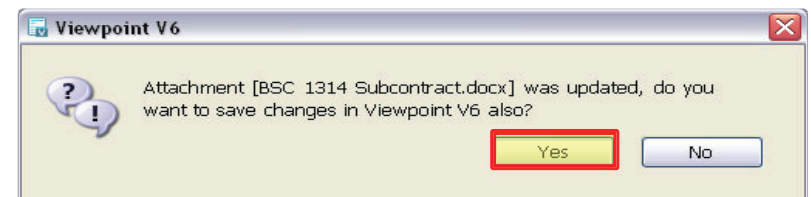
P. O. Box 10850 (7110 2nd Street NW)
Albuquerque, New Mexico 87184
Telephone (505) 765-1200 Fax (505) 842-5419

SUBCONTRACT NO.: 1212-03.3000-S

THIS AGREEMENT, made and entered into this **5th day of July, 2013**, by and between, **Intercon Company, LLC**, doing business as **same** with principal office at **PO Box 1464, Los Lunas, NM 87031** hereinafter called the subcontractor, and **Bradbury Stamm Construction, Inc.**, hereinafter called the Contractor, Witnesseth:

SECTION 1. The Subcontractor agrees to furnish all supervision, layout, engineering, labor, material, and equipment as described in Section 3 hereof for the construction of **the La Vida Llena Rio Rancho** located at **La Vida Llena., 10501 Lagrima De Oro NE, Albuquerque, NM 87111** hereinafter called the Owner, in accordance with all conditions of the Plans, Specifications, General and Special Conditions and the General Contract between the Owner and the Contractor.

24. Once you have completed the modifications and updates. Click the “save” icon in word. An alert window will pop-up asking if you want to save changes in Viewpoint. Single-click “Yes”. This will attach this word file to the subcontract item you just created.



25. After you have saved it and before you close the word file, save the word file as a .PDF document to a temporary folder. From there, attach this .PDF fill to an email in Outlook addressed to the subcontractor/supplier key contact. In the body of the email direct them to sign and email back to you.

26. When you receive the .PDF back signed by the subcontractor/supplier, verify no revisions have been made, sign, and email back to your key contact the executed file. Make sure you CC your project tech and include the word “Signed” in the subject line to notify them to then upload the signed subcontract into Viewpoint. The project tech will then interface the executed subcontract in viewpoint. This will then trigger accounting to import this into textura (24-48 hrs)

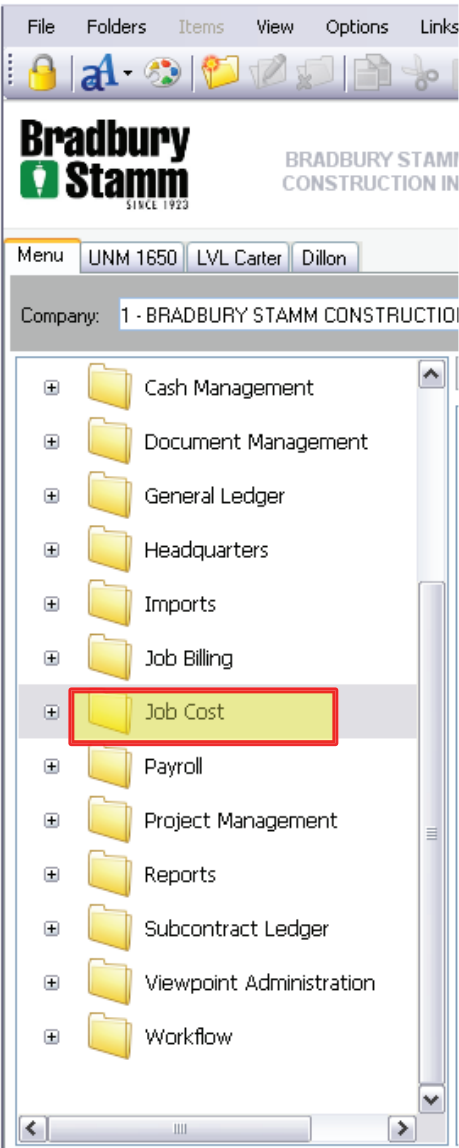
[Note: Subcontractors cannot receive payment until these steps are completed.](#)

End of Section Continue with steps 9 through 26 to complete all subcontracts/material contracts.

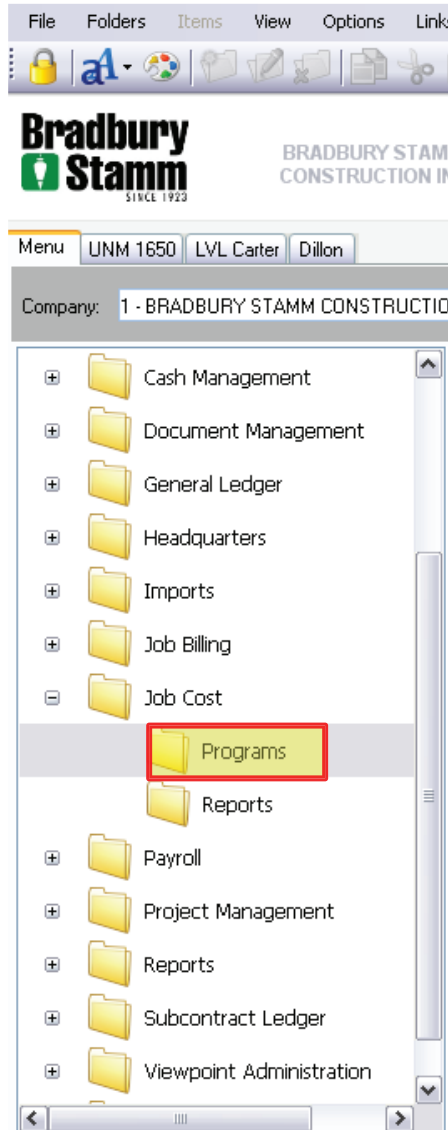
Cost Projections



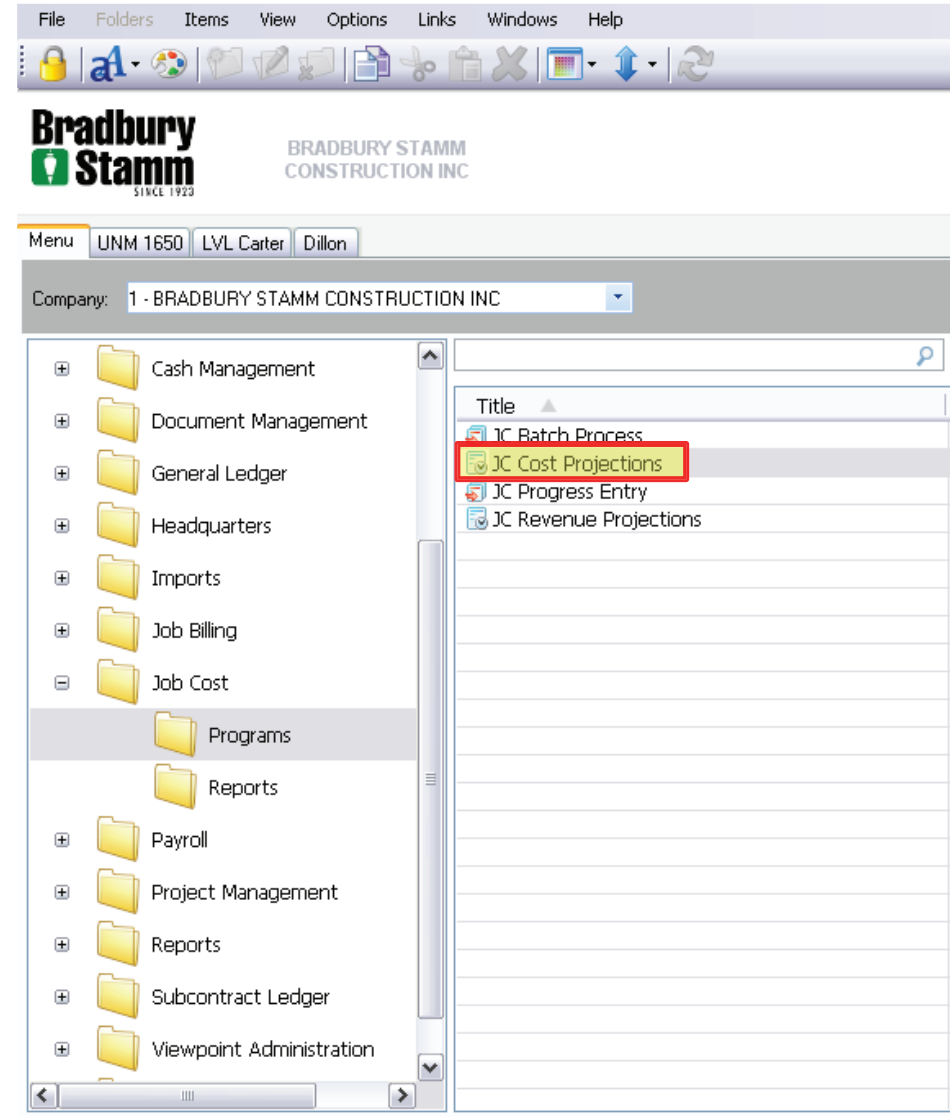
1. Locate and double-click “Job Cost” from folder panel



2. Locate and single-click “Programs” from the folder panel



3. Locate and double-click “JC Cost Projections” from the item list



Cost Projections



4. A new window will appear. Make sure the option button indicated “Create a new batch” and that the “Batch Month:” is current. Once those are verified, single-click “OK”.

Do you want to

☒ Create a new batch ☐ Use an existing batch

Batch Month: 01/14 ☐ Restricted Access

Display

☒ Show my batches only ☐ Include canceled batches

OK Cancel

Month	Batch #	Created By	Created	In Use By	Status	Restricted	Source
-------	---------	------------	---------	-----------	--------	------------	--------

5. A new window will appear. Type in your job number next to “Job:” .

File Edit Records View Options Tools Windows Help

Months: 01/14 Batch #: 227 Date: 1/15/14 Job: [Red Box]

Item	Phase	Description	Cost Type	Curr Est + Incl CO's	Actual Cost	Projected Cost	Current Est'd Units	Actual Units	Projected Units	Original Est'd Hours	Actual Hours	Projected Hours	Actual + Committed Units	Actual + Committed Hours
				0.00	0.00	0.00				0.00	0.00	0.00		

Records: Totals: 0.00 0.00 0.00 0.00 0.00 0.00

Grid Info Notes Projection Detail

Item: Phase: Cost Type: Hrs/ManDay: UM: Buy Out

	Curr Est + Incl CO's	Actual + Cntd	% Complete	Over / Under	Remaining	Final	Previous	Forecast
Units:								
Hours:								
Costs:								
U/C:								
U/HR:								

Set Remain UC Calculate Refresh Data JC Cost Report Future CO's Costs

Enter the projection date

Record 0 of 0 Grid Co#: 1

Cost Projections



6. If you have already input your project original budget and accounting has interfaced that budget, your project will populate the numerous phases and cost types of the project. The lower half of the window has tabs. Single-click the “Grid” tab.

FileEditRecordsViewOptionsToolsWindowsHelp

</

Cost Projections



7. On the bottom half of the window identify which phase you would like to project. Then under the “Final Cost” column, input your cost projection for that phase item. Continue these projections for each item all the way down the “Final Cost” column.

File Edit Records View Options Tools Windows Help
Grid

Month: 01/14 Batch #: 227 Date: 1/15/14 Job: 1207. LVL Carter Hall

Phase	Description	Cost Type	Curr Est + Incl CO's	Actual Cost	Projected Cost	Current Est'd Units	Actual Units	Projected Units	Original Est'd Hours	Actual Hours	Projected Hours	Actual + Committed Units	Actual + Committed Cost	Contra Item
01.1000.	Project Manager	LAB	65,550.00	29,044.48	35,000.00	0.000	0.000	65,550.000	0.00	1,038.00	0.00	0.000	29,044.48	
01.1000.	Project Manager	BUR	36,054.00	15,974.35	19,250.00	0.000	0.000	0.000	0.00	0.00	0.00	0.000	15,974.35	
01.1000.	Project Manager	OTH	19,950.00	2,645.53	5,000.00	0.000	0.000	0.000	0.00	0.00	0.00	0.000	2,645.53	
01.1012.	Project Engineer	LAB	25,200.00	3,088.27	10,000.00	0.000	0.000	0.000	0.00	175.00	0.00	0.000	3,088.27	
01.1012.	Project Engineer	BUR	13,860.00	1,698.52	5,500.00	0.000	0.000	0.000	0.00	0.00	0.00	0.000	1,698.52	
01.1012.	Project Engineer	OTH	0.00	18.69	1,000.00	0.000	0.000	0.000	0.00	0.00	0.00	0.000	18.69	
01.1024.	Project Technician	LAB	8,400.00	3,778.50	8,400.00	0.000	0.000	0.000	0.00	234.25	0.00	0.000	3,778.50	
01.1024.	Project Technician	BUR	4,620.00	2,078.37	4,620.00	0.000	0.000	0.000	0.00	0.00	0.00	0.000	2,078.37	
01.1044.	Estimator	LAB	110.95	0.00	0.00	0.000	0.000	0.000	0.00	0.00	0.00	0.000	0.00	
01.1044.	Estimator	BUR	61.02	0.00	0.00	0.000	0.000	0.000	0.00	0.00	0.00	0.000	0.00	
01.1046.	BIM Coordination	LAB	0.00	72.10	1,000.00	0.000	0.000	0.000	0.00	3.00	0.00	0.000	72.10	
01.1046.	BIM Coordination	BUR	0.00	39.66	620.00	0.000	0.000	0.000	0.00	0.00	0.00	0.000	39.66	
01.1048.	Project Superintenden	LAB	82,080.00	59,844.04	68,000.00	0.000	0.000	0.000	0.00	1,892.00	0.00	0.000	59,844.04	
01.1048.	Project Superintenden	BUR	45,144.00	32,914.19	37,400.00	0.000	0.000	0.000	0.00	0.00	0.00	0.000	32,914.19	
01.1048.	Project Superintenden	EQU	0.00	6,560.00	10,830.00	0.000	0.000	0.000	0.00	0.00	0.00	0.000	6,560.00	
01.1048.	Project Superintenden	OTH	21,660.00	4,029.00	7,000.00	0.000	0.000	0.000	0.00	0.00	0.00	0.000	4,029.00	
01.1116.	Blue Prints & Specifica	OTH	4,500.00	3,390.71	5,500.00	0.000	0.000	0.000	0.00	0.00	0.00	0.000	3,390.71	
01.1156.	Building Permit	OTH	0.000	17,016.36	10,000.00	0.000	0.000	0.000	0.00	0.00	0.00	0.000	17,016.36	
01.1168.	Deconstruction Confer	OTH	4,307,183.00	3,264,495.07	4,307,183.00				0.00	5,952.25	0.00		3,617,430.17	
Records: 213 Totals:														

Grid

Info

Notes

Projection Detail

Phase	Cost Type	UM	Minimum Projection	Buy Out	Over/Under Cost	Remaining Cost	Final Cost	Uncommitted Cost	CurrEstUnits	Actual Units	Percent Complete Units	Over/Under Units	Remaining Units	Final Units	Previous Units	Forecast Units	CurrEstH
00.1024.	1	LS	10.00 %	☐	0.00	-25.50	0.00	0.00	0.000	0.000	0.000000	0.000	0.000	0.000	0.000	0.000	0.000
00.1024.	2	LS	10.00 %	☐	0.00	-14.03	0.00	0.00	0.000	0.000	0.000000	0.000	0.000	0.000	0.000	0.000	0.000
01.1000.	1	LS	10.00 %	☐	-30,550.00	5,955.52	35,000.00	0.00	0.000	0.000	0.000000	65,550.000	65,550.000	65,550.000	65,550.000	0.000	0.000
01.1000.	2	LS	10.00 %	☐	-16,804.00	3,275.65	19,250.00	0.00	0.000	0.000	0.000000	0.000	0.000	0.000	0.000	0.000	0.000
01.1000.	6	LS	10.00 %	☐	-14,950.00	2,354.47	5,000.00	0.00	0.000	0.000	0.000000	0.000	0.000	0.000	0.000	0.000	0.000
01.1012.	1	LS	10.00 %	☐	-15,200.00	6,911.73	10,000.00	0.00	0.000	0.000	0.000000	0.000	0.000	0.000	0.000	0.000	0.000
01.1012.	2	LS	10.00 %	☐	-8,360.00	3,801.48	5,500.00	0.00	0.000	0.000	0.000000	0.000	0.000	0.000	0.000	0.000	0.000
01.1012.	6	LS	10.00 %	☐	1,000.00	981.31	1,000.00	0.00	0.000	0.000	0.000000	0.000	0.000	0.000	0.000	0.000	0.000
01.1024.	1	LS	10.00 %	☐	0.00	4,621.50	8,400.00	0.00	0.000	0.000	0.000000	0.000	0.000	0.000	0.000	0.000	0.000

Set Remain UC

Calculate

Refresh Data

IC Cost Report

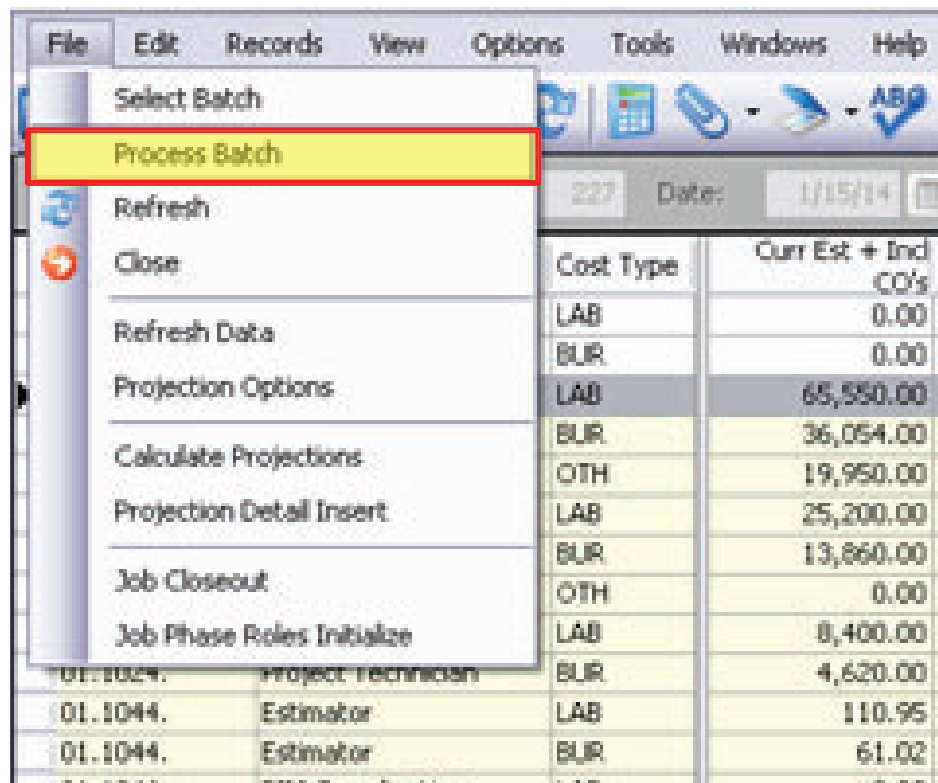
Future CO's

Costs

Cost Projections



8. Once your cost projections are input, single click the upper left-hand tool bar item “File”. Locate and single-click “Process batch”



9. A new window will appear. From this window single-click “Validate” and then single-click “Post”. This will post your cost projections on the job cost reports.

The screenshot shows the '1 JC Batch Process' window. The 'Validate' button is highlighted with a red rectangle. The 'Post' button is also highlighted with a red rectangle. The window contains various fields for batch information and options.

Month: 01/14 Batch#: 227

Info

Created by: ehamblin

Created: 1/15/2014 5:03:00 PM

Source: JC Projctn

Status: Validated

Audit Reports

☒ Batch List

☐ Show Full Projection Detail

☐ GL Account Distribution

☐ Inventory Distribution

☐ Error List

Update

GL Interface:

Journal:

Attach Batch Reports to HQ Batch Control: Yes

Posting Date: 1/15/14

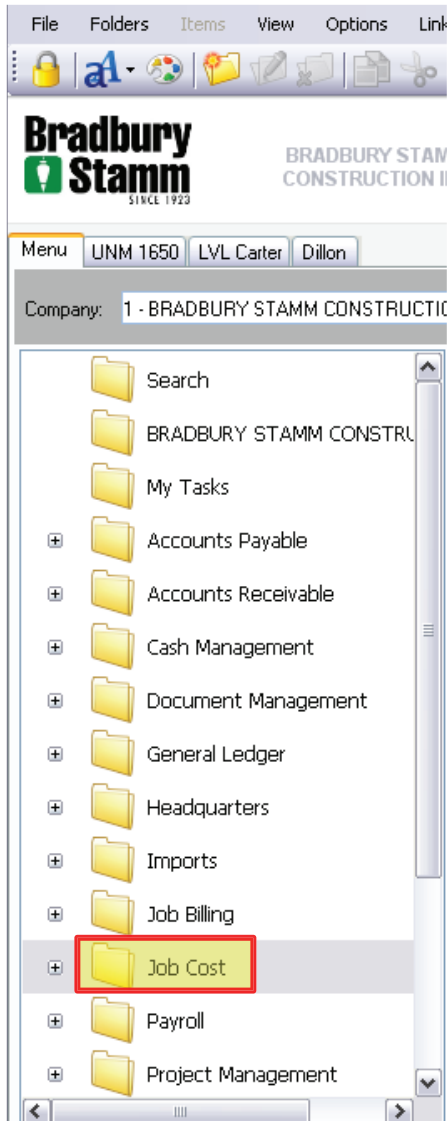
Co#: 1

End of Section

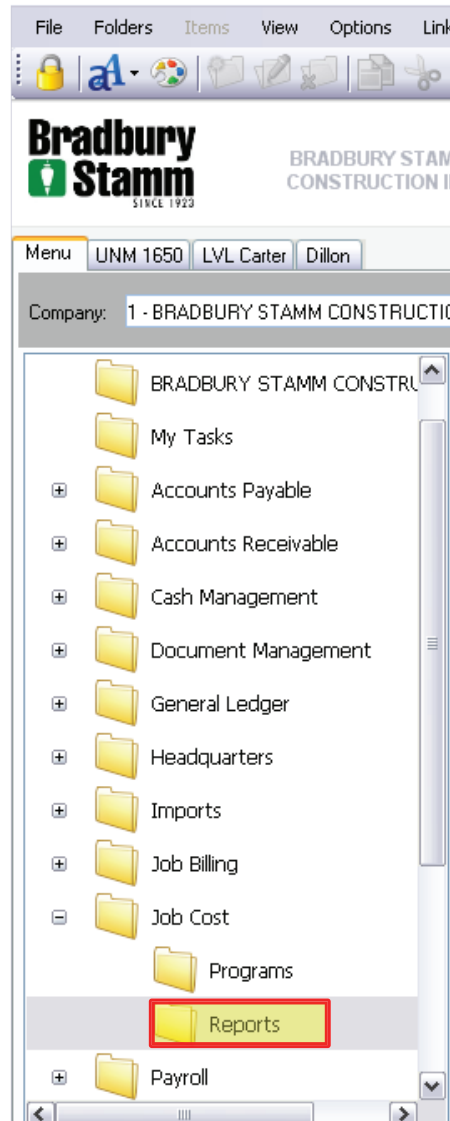
Gross Profit Reports



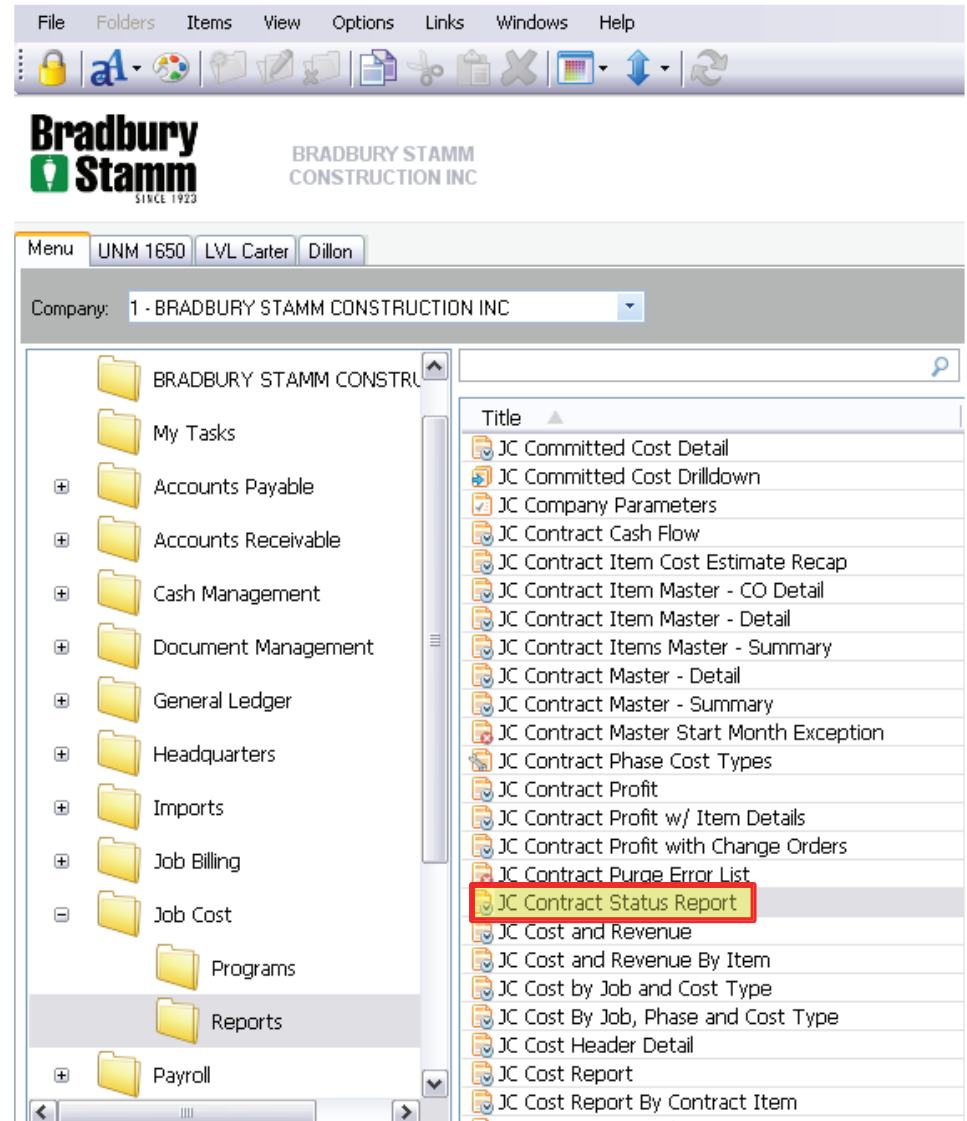
1. Locate and double-click
“Job Cost”
from folder panel



2. Locate and single-click
“Reports” from the folder
panel



3. Locate and double-click “JC Contract Status Report” from
the item list



Gross Profit Reports



4. Single-click inside the cell to the right of "Beginning Contract". Hit function key "F4". This will bring up the available BSC job contract numbers.

488: JC Contract Status Report - La...

File Help

JC Contract Status Report

Inputs Report Info Notes

Company: 1

Beginning Contract:

Ending Contract:

Through Month: 02/14

(O)pen, (C)losed or (A)ll Jobs: O

If Closed Jobs Only:

Beginning Closed Month:

Ending Closed Month:

Preview Print Export Cancel

Co#: 1

5. Single-click the top cell of column title "contract".

All Contracts Lookup

Contract	Description
1203.	Lockwood Elementary
1204.	1650 University Core & Shell Renovation
1205.	Baish Veteran's Park
1206.	LVL Alta Vista Update
1207.	La Vida Llena Carter Hall & Commons Building Remodel
1208.	UNM "U" at Hodgkin Hall
1209.	UNMH Lands West Phase I
1210.001	4926 Quail Ridge
1210.002	10442 Napoli Pl
1210.003	4112 Cuba Rd NW
1210.004	10515 Sorrento Dr NW

OK Cancel

6. Input the job number you wish to create a report for. Single-click the "OK" button.

All Contracts Lookup

Contract	Description
1207.	La Vida Llena Carter Hall & Commons Building Remodel Pro

OK Cancel

7. From this screen, single-click "print". Select which printer you wish to print to.

Note: If you would like the most up-to-date data, make sure you select the current month in the cell right of "Through Month".

488: JC Contract Status Report - La...

File Help

JC Contract Status Report

Inputs Report Info Notes

Company: 1

Beginning Contract: 1207.

Ending Contract: 1207.

Through Month: 02/14

(O)pen, (C)losed or (A)ll Jobs: O

If Closed Jobs Only:

Beginning Closed Month:

Ending Closed Month:

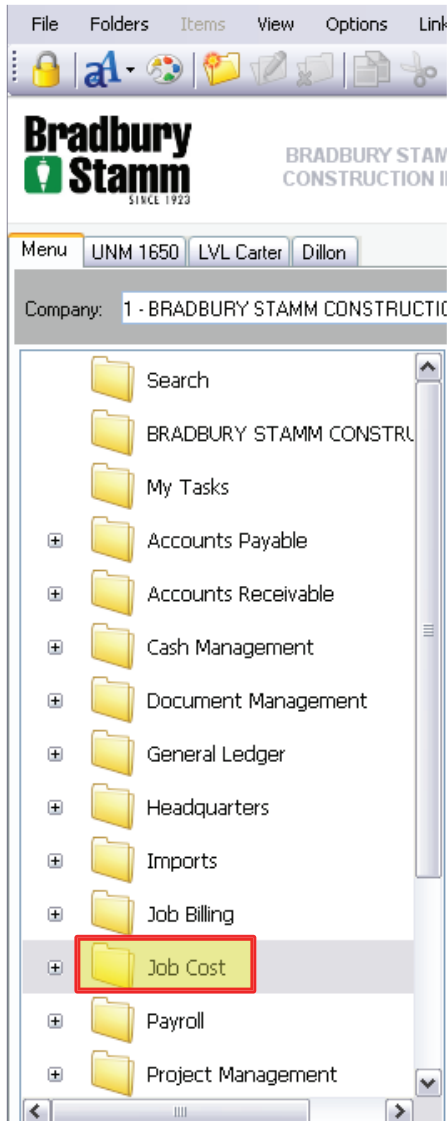
Preview Print Export Cancel

Co#: 1

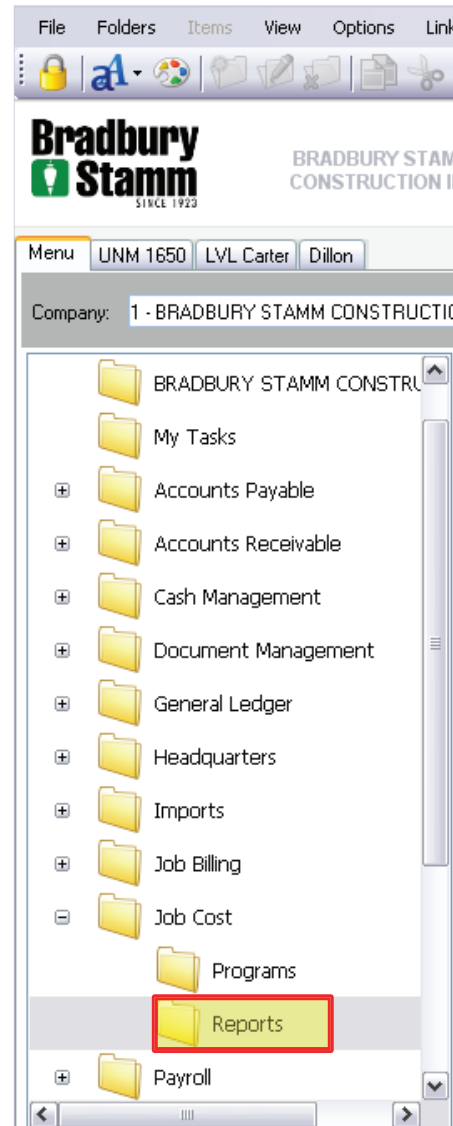
Gross Profit Reports



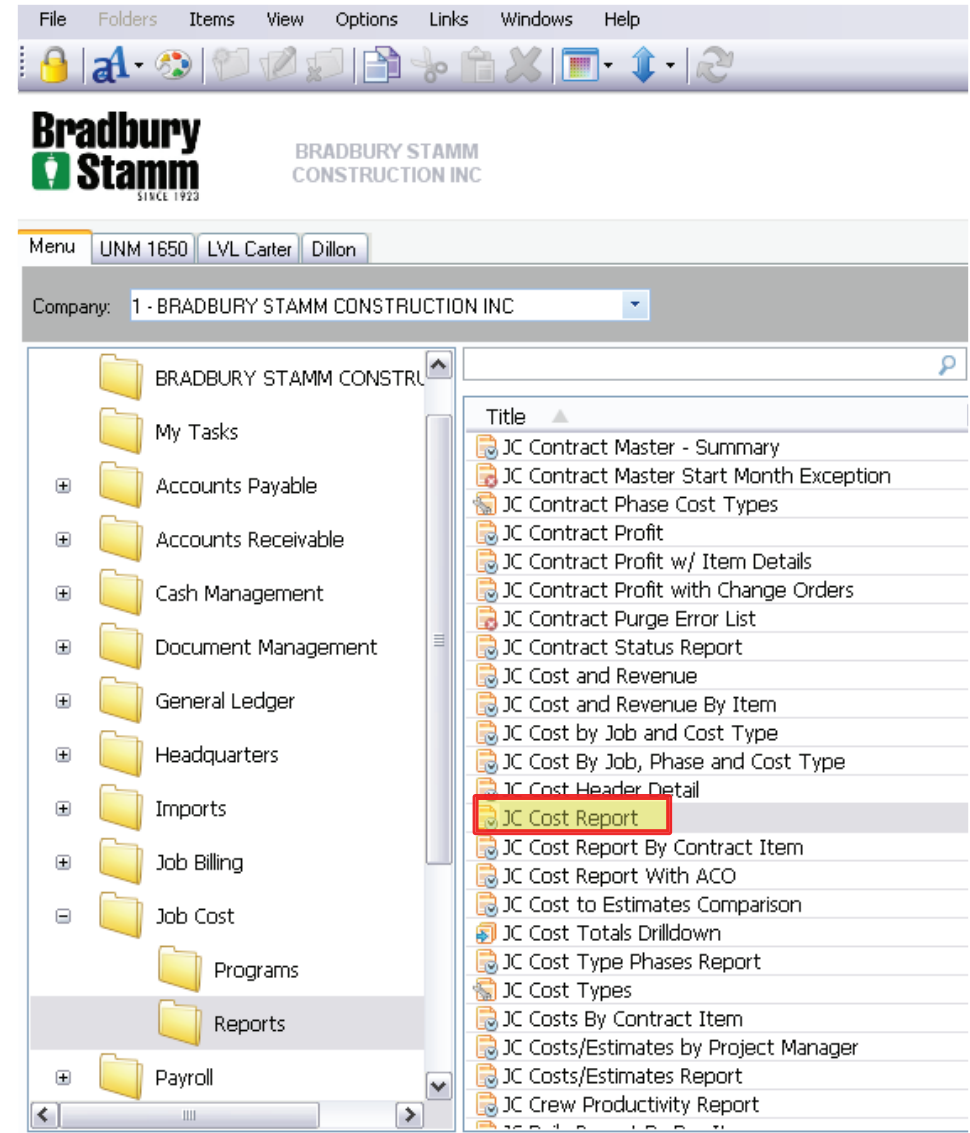
8. For the next report, locate and double-click “Job Cost” from folder panel



9. Locate and single-click “Reports” from the folder panel



10. Locate and double-click “JC Cost Report” from the item list





Gross Profit Reports

11. Single-click inside the cell to the right of “Beginning Job”. Hit function key “F4”. This will bring up the available BSC job contract numbers.

492: JC Cost Report - Launcher

File Help

JC Cost Report

Inputs Report Info Notes

Company: 1

Beginning Job: [Red Box]

Ending Job:

Through Month: 02/14

Page by Job?: ☒

(O)pen, Open /(S)oft Closed, (C)lose or (A)ll Jobs?: O

If Closed Jobs Only:

Beginning Closed Month:

Ending Closed Month:

Preview Print Export Cancel

Co#: 1

12. Single-click the top cell of column title “Job”.

All Jobs Lookup

Job	Description
1113.001	Sunland Park Repairs Surge Anticipator
1113.002	Sunland Park Repair 2
1114.	CSV Wound & Hyperbaric Ctr Remodel
1201.	The Downs at ABQ
1202.	La Fonda Guest Room Renovation
1203.	Lockwood Elementary
1204.	1650 University Core & Shell Renovation
1205.	Baish Veteran's Park
1206.	LVL Alta Vista Update
1207.	LVL Carter Hall
1208.	UNM "U" at Hodgin Hall
1209.	UNMH Lands West Phase I
1210.001	4926 Quail Ridge
1210.002	10442 Napoli Pl
1210.003	4112 Cuba Rd NW
1210.004	10515 Sorrento Dr NW

OK Cancel

13. Input the job number you wish to create a report for. Single-click the “OK” button.

All Jobs Lookup

Job	Description
1207.	LVL Carter Hall

OK Cancel

14. From this screen, single-click “print”. Select which printer you wish to print to.

Note: If you would like the most up-to-date data, make sure you select the current month in the cell right of “Through Month”.

492: JC Cost Report - Launcher

File Help

JC Cost Report

Inputs Report Info Notes

Company: 1

Beginning Job: 1207.

Ending Job: 1207.

Through Month: 02/14

Page by Job?: ☒

(O)pen, Open /(S)oft Closed, (C)lose or (A)ll Jobs?: O

If Closed Jobs Only:

Beginning Closed Month:

Ending Closed Month:

Preview **Print** Export Cancel

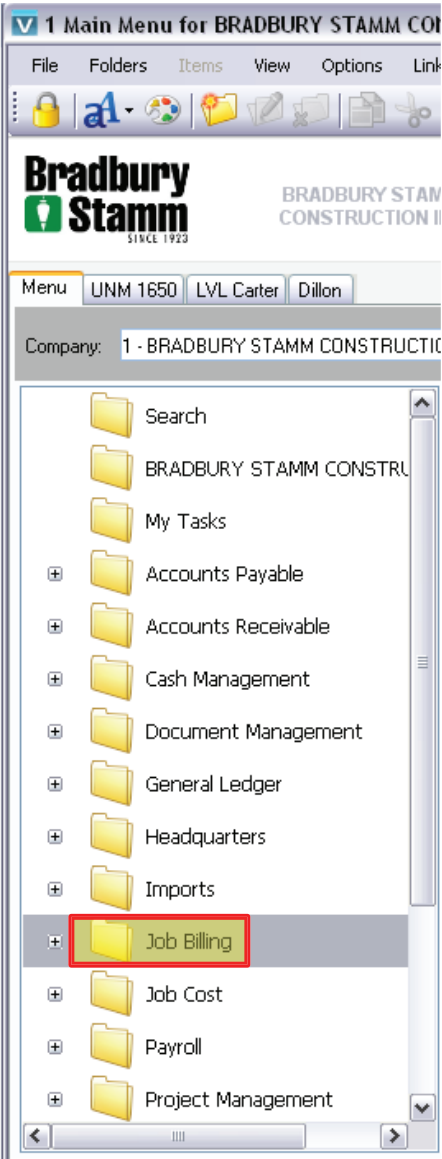
Co#: 1

End of Section

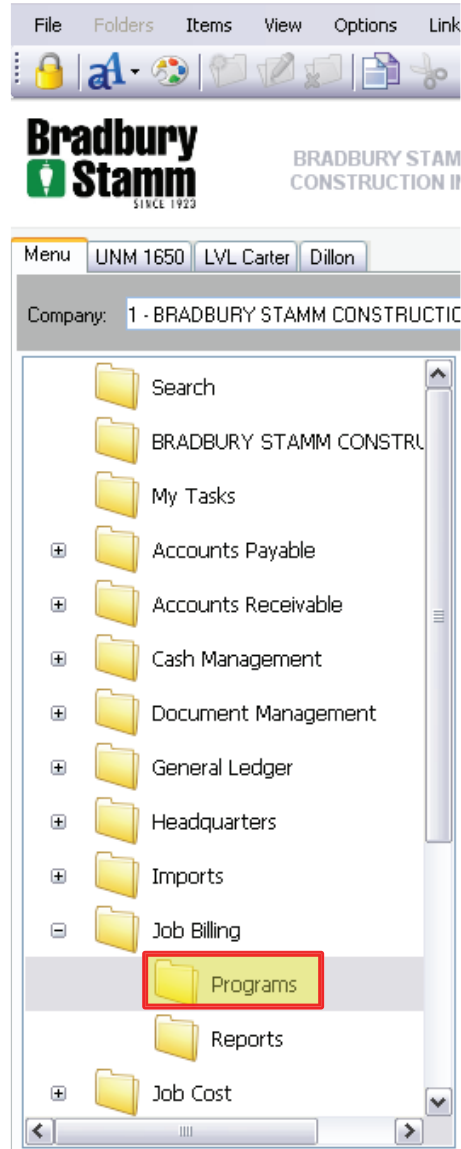
Progress Billing



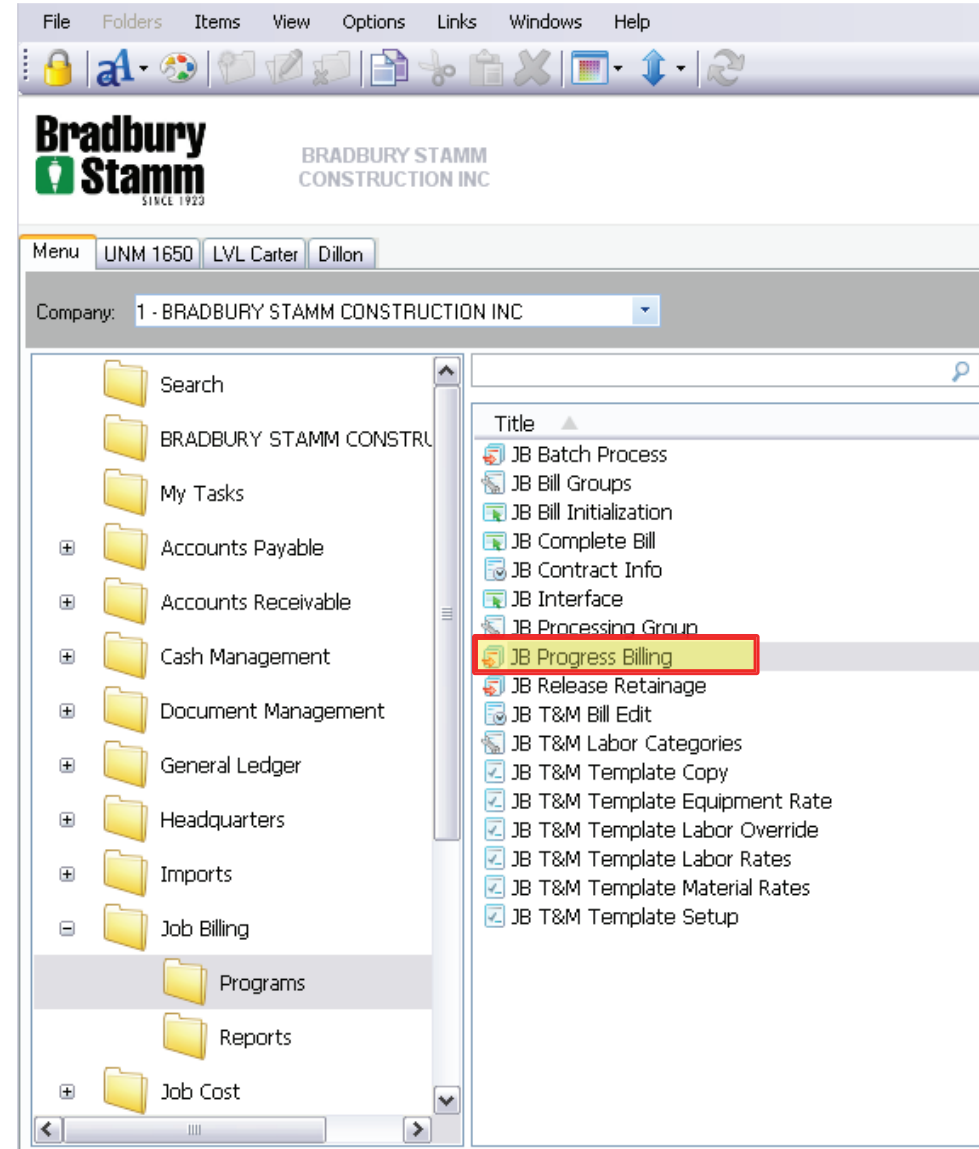
1. Locate and double-click “Job Billing” from folder panel



2. Locate and single-click “Programs” from the folder panel



3. Locate and double-click “JB Progress Billing” from the item list





Progress Billing

4. Locate and change the “Bill Month” cell to the month you are billing. Locate and single-click “Grid” from the upper tabs.

File Edit Records View Options Tools Windows Help

Bill Month: 01/14 Sequence: 4 JB App #12

Bill Items Info

Grid Info Items Item SM/Tax Misc Distributions Notes

Invoice: 2063 Invoice Date: 1/27/14

Contract: 1207 La Vida Llena Carter Hall & Commons... Pay Terms: 30 Net 30th

Customer: 1030 Haverland Carter Lifestyle Group Due Date: 2/28/14

Application #: 12 Discount Date:

Invoice Desc: JB App #12 From Date:

Status: A-Active To Date:

Process Group:

Receivable Type: 1

Bill Address Info

Address: 10701 Montgomery NE Ste F

City: Albuquerque State: NM

Zip Code: 87111 Country:

Add'l Address:

Change Orders Retainage Totals Post Bill

5. From this tab screen you will create a billing. Single-click the open cell next to the “*” under the “Bill Month” column. Type in the month of the billing MM/YY. Hit the “Enter” button on your keyboard.

File Edit Records View Options Tools Windows Help

Bill Month: 02/14 Sequence: 1 Pay App #4

Bill Items Info

Grid Info Items Item SM/Tax Misc Distributions Notes

Bill Month	Sequence	Invoice	Contract	Contract Desc	Customer	Name	Application #	Invoice Description	Invoice Status	Process Group	Process
02/14	1		1318.	Albuq Convention Center	1011	City of Albuquerque	4	Pay App #4	A-Active		

Progress Billing



6. This will auto-fill the invoice number under the “Invoice” column. Under the “Sequence” column, enter the “N” button on your keyboard and then hit the “Enter” button.

File Edit Records View Options Tools Windows Help

Bill Month: 02/14 Sequence:

Grid

Bill Items Info

Grid	Info	Items	Item SM/Tax	Misc Distributions	Notes							
	Bill Month	Sequence	Invoice	Contract	Contract Desc	Customer	Name	Application #	Invoice Description	Invoice Status	Process Group	Proce
	02/14	1		1318.	Albuq Convention Center	1011	City of Albuquerque	4	Pay App #4	A-Active		
	02/14		2094							A-Active		

7. Locate and single-click the blank cell under the “Contract” column. Hit the keyboard function key “F4”.

File Edit Records View Options Tools Windows Help

Bill Month: 02/14 Sequence: 2

Grid

Bill Items Info

Grid	Info	Items	Item SM/Tax	Misc Distributions	Notes						
	Bill Month	Sequence	Invoice	Contract	Contract Desc	Customer	Name	Application #	Inv	Group	Proce
	02/14	1		1318.	Albuq Convention Center	1011	City of Albuquerque	4	Pay		
	02/14	2	2094								

8. This will bring up a small window. Type the job number into the blank cell under the “Contract” column. Double-click the job for which that number corresponds.

Open Contracts Lookup

Select One:

☒ Open Contracts

☐ All Contracts

Contract	Description
1207	
1207.	La Vida Llena Carter Hall & Commons Building Remodel Pro

Setup OK Cancel

[illegible]

File Edit Records View Options Tools Windows Help

Bill Month: 02/14 Sequence: 2

Bill Items Info

Grid	Info	Items	Item SM/Tax	Misc Distributions	Notes					
	Item	Description	UM	Contract Amount	Previous Amount	% Complete	This Bill WC Amount	To Date Amount	Retainage %	Retainage
	1.00	Dillion Hall Phase 2	LS	5,525,733.76	3,157,037.15	57.13 %	0.00	3,157,037.15	0.00 %	0.00
	2.00	Dillion Hall - Health Services	LS	272,632.50	181,314.01	66.50 %	0.00	181,314.01	0.00 %	0.00



11. Once you have filled in the billing amount(s), now locate and single-click “Info” from the upper tabs.

Item	Description	U/M	Contract Amount	Previous Amount	% Complete	This Bill W/C Amount	To Date Amount	Retainage %	Retainage
1.00	Dillion Hall Phase 2	L5	5,525,733.76	2,599,346.74	57.13 %	557,690.41	3,157,037.15	0.00 %	0.00
2.00	Dillion Hall - Health Services	L5	272,632.50	157,923.45	66.50 %	23,390.56	181,314.01	0.00 %	0.00

12. Single-click the downward arrow to the right of the “paperclip” icon above. From the dropdown, single-click “Add Attachment”. This will allow you to upload the corresponding signed and approved pay application for this billing. *Note: Accounting will interface this by the 18th of each month.*

Invoice: 2096 Invoice Date: 2/13/14

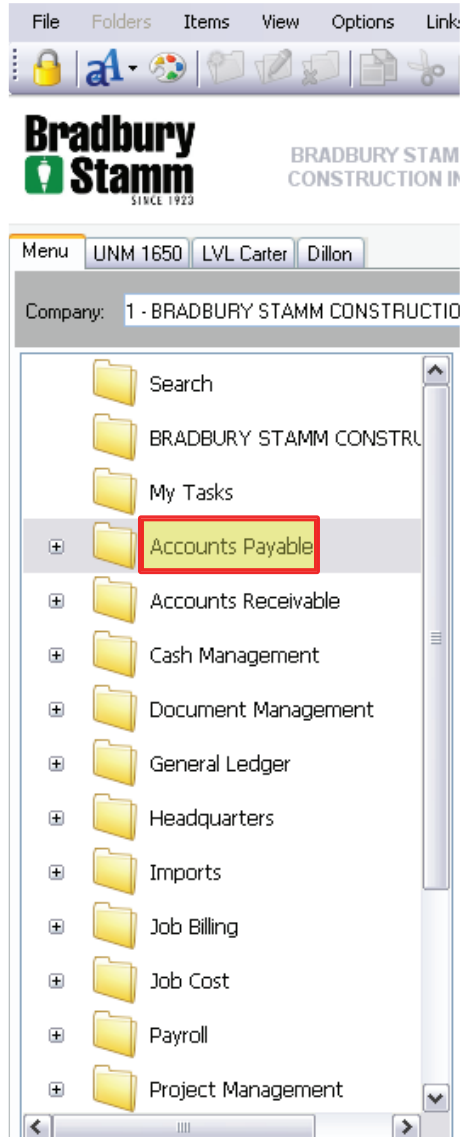
Contract: 1314 Dillon Hall Phase 2 Pay Terms: 30 Net 30th

Customer: 1041 New Mexico School for the Deaf Due Date: 3/30/14

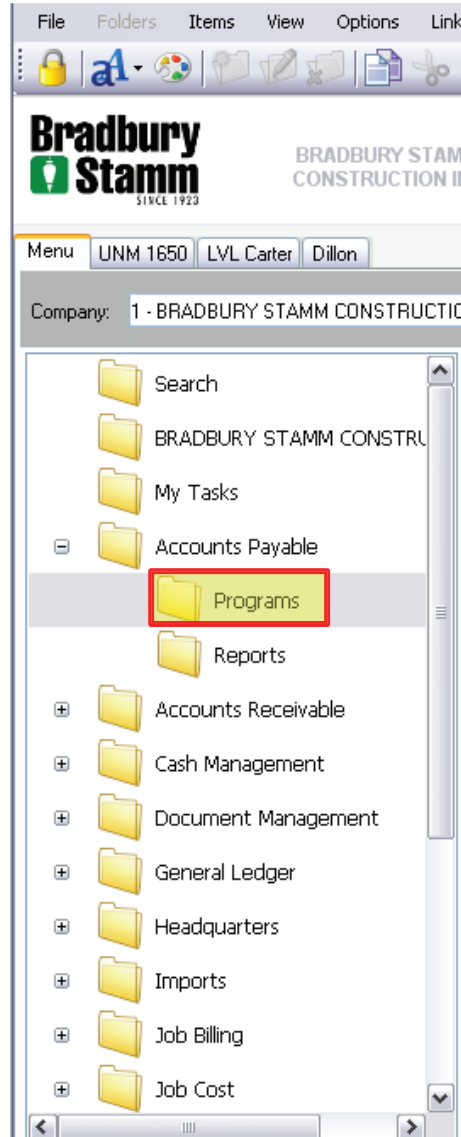
Invoice Review



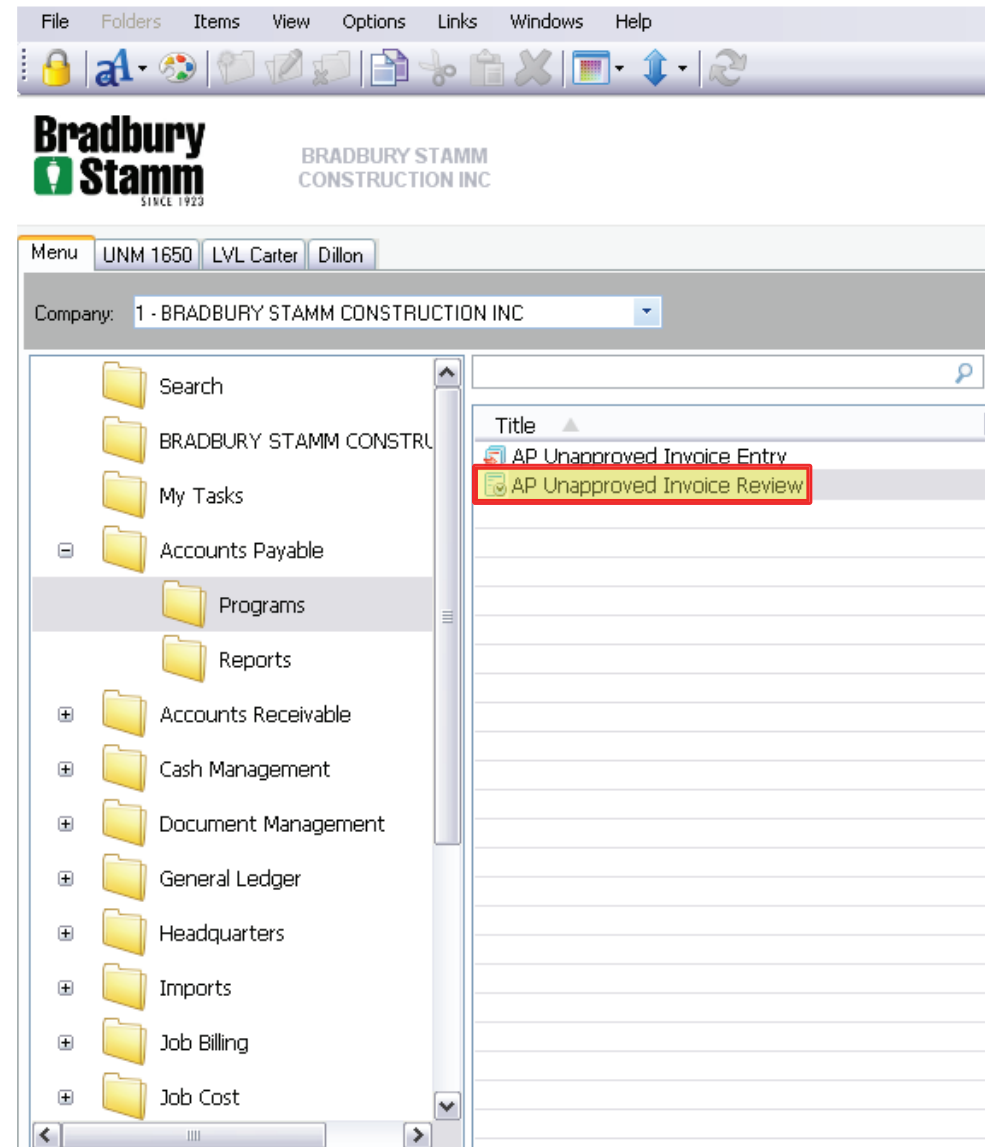
1. Locate and double-click “Accounts Payable” from folder panel



2. Locate and single-click “Programs” from the folder panel



3. Locate and double-click “AP Unapproved Invoice Review” from the item list



Invoice Review



4. In the open cell to the right of “Reviewer:”, single-click in the cell and hit keyboard button “F4”. This will bring up a new window in which you can locate your name. Double-click your name from the list. **Note:** If this is your first time doing this and your name is not on the list, go speak with accounting to have your name added.

File Edit Records View Options Tools Windows Help

Reviewer: Attachments

Line Types: Job ☐ Display All Reviewer Invoices
 Inventory ☐ Display Invoices posted to a selected job
 Expense
 Equipment

Month: Seq #: JC Co #: Job: Refresh

Invoice Setup

Grid Info Invoice Notes Invoice Status

Month	Seq#	Vendor	Vendor Name	AP Reference	Invoice Total	Reviewer Total	Approved	Rejected	Reason	Rej Desc	Invoice Notes

Line #:

Grid Info Line Notes Reviewer Notes Other Info

Line #	Type Desc	UM	Gross	Total	Approve	Reject	JC Col	Job

Reviewers Lookup

Reviewer	Name
AP	Art Peterson
AR	Adam Rael
BT	Barbi Towne
CH	Carlie Humphreys
CS	Cynthia Schultz
DL	Dan Lyons
DM	Darren Mortensen
DT	Dennis Towne
EH	Easton Hamblin
JL	James Lloyd
JS	Joe Sanchez
JSM	Jori Smith

Setup OK Cancel

Invoice Review



5. Single-click the “Refresh” button

File Edit Records View Options Tools Windows Help

Grid

Reviewer: **EH** Easton Hamblin

Line Types: Job Inventory Expense Equipment

Month: Seq #: Invoice Setup

Display All Reviewer Invoices

Display Invoices posted to a selected job

JC Co #: Job:

Attachments

Refresh

Month	Seq#	Vendor	Vendor Name	AP Reference	Invoice Total	Reviewer Total	Approved	Rejected	Reason	Rej Desc	Invoice Notes
-------	------	--------	-------------	--------------	---------------	----------------	----------	----------	--------	----------	---------------

Line #:

Line #	Type	Desc	UM	Gross	Total	Approve	Reject	JC Co	Job	JC Phase	JC CT	Ret	Discount	Reason	EM C
--------	------	------	----	-------	-------	---------	--------	-------	-----	----------	-------	-----	----------	--------	------

Invoice Review



6. The upper-half portion of the window will show your unapproved invoices. The bottom-half portion shows the detail of the selected upper-half item. Each item should have an attached backup to provide more detail. Single right-click the empty grey portion in the upper-right hand corner.

File Edit Records View Options Tools Windows Help

Reviewer: EH Easton Hamblin

Month: 01/14 Seq #: 1064 SIGNS/BARRICADES Missing Information

Attachments Invoice Setup

Grid Info Invoice Notes Invoice Status

Month	Seq#	Vendor	Vendor Name	AP Reference	Invoice Total	Reviewer Total	Approved	Rejected	Reason	Rej Desc	Invoice Notes
01/14	1064	7291	SOUTHWEST SAFETY SERVICES INCORPORATED	45197	1,275.65	1,275.65	☐	☐			

Line #: 1 SIGNS/BARRICADES Line is Missing Information

Grid Info Line Notes Reviewer Notes Other Info

Line #	Type	Desc	UM	Gross	Total	Approve	Reject	JC Col	Job	JC Phase	JC CT	Ret	Discount	Reason	EM C
1	1	SIGNS/BARRICADES	LS	1,275.65	1,275.65	☐	☐	1	1314.			0.00	0.00		

Invoice Review



7. Move the mouse over “Attachments” and then single-click “Thumbnail Viewer”

File Edit Records View Options Tools Windows Help

Reviewer: EH Easton Hamblin

Month: 01/14 Seq #: 1064 SIGNS/BARRICADES Missing Information

Attachments Invoice Setup

Grid Info Invoice Notes Invoice Status

Month	Seq#	Vendor	Vendor Name	AP Reference	Invoice Total	Reviewer Total	Approved	Rejected	Reason
01/14	1064	7291	SOUTHWEST SAFETY SERVICES INCORPORATED	45197	1,275.65	1,275.65	☐	☐	

Form Properties Attachments Attachments Calculator Move Custom Buttons Reports Show Attachments Index Search Thumbnail Viewer Add Attachment

Line #: 1 SIGNS/BARRICADES Line is Missing Information

Grid Info Line Notes Reviewer Notes Other Info

Line #	Type/Desc	UM	Gross	Total	Approve	Reject	JC Co Job	JC Phase	JC CT	Ret	Discount	Reason	EM C
1	1 SIGNS/BARRICADES	LS	1,275.65	1,275.65	☐	☐	1 1314.			0.00	0.00		

Invoice Review



8. Double-click the attachment that is showing in the thumbnail viewer on the right hand side to review the actual invoice for backup .

Note: The thumbnail viewer will stay open until you close it. Keep it open until all of your invoices have been reviewed.

File Edit Records View Options Tools Windows Help

Reviewer: EH Easton Hamblin

Month: 01/14 Seq #: 1064 SIGNS/BARRICADES

Missing Information

Attachments
Invoice Setup

Grid Info Invoice Notes Invoice Status

Month	Seq#	Vendor Vendor Name	AP Reference	Invoice Total	Reviewer Total	Approved	Rejected	Reason	Rej Desc	Invoice Notes
01/14	1064	7291 SOUTHWEST SAFETY SERVICES INCORPORATED	45197	1,275.65	1,275.65	☐	☐			

Line #: 1 SIGNS/BARRICADES

Line is Missing Information

Grid Info Line Notes Reviewer Notes Other Info

Line #	Type Desc	UM	Gross	Total	Approve	Reject	JC Col Job	JC Phase	JC CT	Ret	Discount	Reason
1	1 SIGNS/BARRICADES	LS	1,275.65	1,275.65	☐	☐	1 1314.			0.00	0.00	

Invoice Review



9. On the bottom-half portion of the window, single-click the “Info” tab.

File Edit Records View Options Tools Windows Help

Reviewer: **EH** Easton Hamblin

Month: 01/14 Seq #: 1064 SIGNS/BARRICADES Missing Information

Attachments Invoice Setup

Grid Info Invoice Notes Invoice Status

Month	Seq#	Vendor	Vendor Name	AP Reference	Invoice Total	Reviewer Total	Approved	Rejected	Reason	Rej Desc	Invoice Notes
01/14	1064	7291	SOUTHWEST SAFETY SERVICES INCORPORATED	45197	1,275.65	1,275.65	☐	☐			

Line #: 1 SIGNS/BARRICADES Line is Missing Information

Grid Info Line Notes Reviewer Notes Other Info

Line #	Type	Desc	UM	Gross	Total	Approve	Reject	JC Co	JC Job	JC Phase	JC CT	Ret	Discount	Reason
1		SIGNS/BARRICADES	LS	1,275.65	1,275.65	☐	☐	1	1314.			0.00	0.00	

Invoice Review



10. If the invoice is approved (if it is rejected or needs to be revised, skip to 13.), verify it is for the correct job number in the cell right of "Job:". Next, assign this cost to the corresponding budget phase. Single-click the cell right of "Phase:" and hit keyboard function key "F4". Locate and double-click the budget phase code in which to assign this invoice.

File Edit Records View Options Tools Windows Help

Reviewer: EH Easton Hamblin Attachments

Month: 01/14 Seq #: 1064 SIGNS/BARRICADES Missing Information Invoice Setup

Month	Seq#	Vendor/ Vendor Name	AP Reference	Invoice Total	Reviewer Total	Approved	Rejected	Reason	Rej Desc	Invoice Notes
01/14	1064	7291 SOUTHWEST SAFETY SERVICES INCORPORATED	45197	1,275.65	1,275.65	☐	☐			

Line #: 1 SIGNS/BARRICADES Line is Missing Information

Grid Info Line Notes Reviewer Notes Other Info

Approve Reject Reason:

Line Type

1 JC Co: 1 Job: 1314.
Dillon Hall Phase 2
Phase: CT:

GL
GL Co: 1 GL Acct:

Amounts
Gross: 1,275.65
Ret: 0.00 Disc: 0.00 Total: 1,275.65

Info
UM: LS Units: 0.000 UC: 0.00000
Pay Type: 1

Job Phases Lookup

Select One:
☒ Job Phases
☐ Phase Master

Phase	Description
22.0100	Fire Suppression Sprinkler Systems
22.0100	Plumbing and HVAC Contracted Together
26.1000	Electrical
31.2000	Earth Moving
31.3116	Termite Control / Treatment
32.1200	Flexible Paving
32.1723	Pavement Markings
32.3100	Fences & Gates

Setup OK Cancel

Invoice Review



11. In the cell right of "CT" (cost type), enter the cost type number (1-7) that corresponds to this invoice. These are 1-Labor (BSC labor), 2-Burden (BSC burden), 3-Material (Material contracts), 4-Subcontract, 5-Equipment (Internal Rentals), 6-Other (Gas, fuel, misc. expenses), 7-Tax (NMGRT). **Note, you will not use "7" typically unless it is for phase item "98.1000." which will be the sum NMGRT for your project.**

File Edit Records View Options Tools Windows Help

Reviewer: EH Easton Hamblin Attachments

Month: 01/14 Seq #: 1064 SIGNS/BARRICADES Missing Information Invoice Setup

Grid	Info	Invoice Notes	Invoice Status							
Month	Seq#	Vendor Vendor Name	AP Reference	Invoice Total	Reviewer Total	Approved	Rejected	Reason	Rej Desc	Invoice Notes
01/14	1064	7291 SOUTHWEST SAFETY SERVICES INCORPORATED	45197	1,275.65	1,275.65	☐	☐			

Line #: 1 SIGNS/BARRICADES Line is Missing Information

Grid Info Line Notes Reviewer Notes Other Info

☐ Approve ☐ Reject Reason:

Line Type

1 JC Co: 1 Job: 1314.

Dillon Hall Phase 2

Phase: 32.1200. CT: 1

Flexible Paving

GL

GL Co: 1 GL Acct:

Amounts

Gross: 1,275.65

Ret: 0.00 Disc: 0.00 Total: 1,275.65

Info

UM: LS Units: 0.000 UC: 0.00000

Pay Type: 1

Invoice Review



12. Now that the info is added, single-click the “Approve” check box on the bottom-half portion, followed by double-clicking the check box on the upper-half portion under the “Approved” column for that item.

File Edit Records View Options Tools Windows Help

Reviewer: EH Easton Hamblin Attachments

Month: 01/14 Seq #: 1064 SIGNS/BARRICADES Missing Information Invoice Setup

Grid Info Invoice Notes Invoice Status

Month	Seq#	Vendor	Vendor Name	AP Reference	Invoice Total	Reviewer Total	Approved	Rejected	Reason	Rej Desc	Invoice Notes
01/14	1064	7291	SOUTHWEST SAFETY SERVICES INCORPORATED	45197	1,275.65	1,275.65	☒	☐			

Line #: 1 SIGNS/BARRICADES Line is Missing Information

Grid Info Line Notes Reviewer Notes Other Info

☒ Approve ☐ Reject Reason:

Line Type

1 JC Co: 1 Job: 1314
Dillon Hall Phase 2
Phase: 32.1200. CT: 6
Flexible Paving

GL
GL Co: 1 GL Acct: 1565.2 WIP Other

Amounts
Gross: 1,275.65
Ret: 0.00 Disc: 0.00 Total: 1,275.65

Info
UM: LS Units: 0.000 UC: 0.00000
Pay Type: 1

Invoice Review



13. If you would like to reject or have the item revised for some reason, follow these steps. Single click the “Reject:” check box. [Note: If you would like to skip how to reject an invoice, skip to item 18.](#)

File Edit Records View Options Tools Windows Help

Reviewer: EH Easton Hamblin Attachments

Month: 01/14 Seq #: 1064 SIGNS/BARRICADES Missing Information Invoice Setup

Month	Seq#	Vendor	Vendor Name	AP Reference	Invoice Total	Reviewer Total	Approved	Rejected	Reason	Rej Desc	Invoice Notes
01/14	1064	7291	SOUTHWEST SAFETY SERVICES INCORPORATED	45197	1,275.65	1,275.65	☐	☐			

Line #: 1 SIGNS/BARRICADES Line is Missing Information

Grid Info Line Notes Reviewer Notes Other Info

☐ Approve ☒ Reject Reason:

Line Type

1 JC Co: 1 Job: 1314
Dillon Hall Phase 2
Phase: CT:

GL
GL Co: 1 GL Acct: 1565.2 WIP Other

Amounts
Gross: 1,275.65
Ret: 0.00 Disc: 0.00 Total: 1,275.65

Info
UM: LS Units: 0.000 UC: 0.00000
Pay Type: 1

Invoice Review



14. To the empty cell right of "Reason:", single-click in the cell and hit keyboard function key "F4". This will bring up a new window. Double-click your selection from the available options as to why this invoice is being rejected.

File Edit Records View Options Tools Windows Help

Reviewer: EH Easton Hamblin Attachments

Month: 01/14 Seq #: 1064 SIGNS/BARRICADES Missing Information Invoice Setup

Month	Seq#	Vendor	Vendor Name	AP Reference	Invoice Total	Reviewer Total	Approved	Rejected	Reason	Rej Desc	Invoice Notes
01/14	1064	7291	SOUTHWEST SAFETY SERVICES INCORPORATED	45197	1,275.65	1,275.65	☐	☐			

Line #: 1 SIGNS/BARRICADES Line is Missing Information

Grid Info Line Notes Reviewer Notes Other Info

☐ Approve ☒ Reject Reason:

Line Type

1 JC Co: 1 Job: 1314
Dillon Hall Phase 2
Phase: CT:

GL
GL Co: 1 GL Acct: 1565.2 WIP Other

Amounts
Gross: 1,275.65
Ret: 0.00 Disc: 0.00 Total: 1,275.65

Info
UM: LS Units: 0.000 UC: 0.00000
Pay Type: 1

Reason Codes Lookup

Reason Code	Description
A	Adjustment
E	Error
NMI	Not My Invoice
OWN	Owner Requested
R	Reversal
SC	Scope Change

Setup OK Cancel

Invoice Review



15. If the rejection or revision needs an explanation, locate and single-click the “Line Notes” tab.

File Edit Records View Options Tools Windows Help

Reviewer: EH Easton Hamblin Attachments

Month: 01/14 Seq #: 1064 SIGNS/BARRICADES Missing Information Invoice Setup

Grid Info Invoice Notes Invoice Status

Month	Seq#	Vendor	Vendor Name	AP Reference	Invoice Total	Reviewer Total	Approved	Rejected	Reason	Rej Desc	Invoice Notes
01/14	1064	7291	SOUTHWEST SAFETY SERVICES INCORPORATED	45197	1,275.65	1,275.65	☐	☐			

Line #: 1 SIGNS/BARRICADES Line is Missing Information

Grid Info Line Notes Reviewer Notes Other Info

☐ Approve ☒ Reject Reason: E Error

Line Type

1 JC Co: 1 Job: 1314
Dillon Hall Phase 2
Phase: CT:

GL
GL Co: 1 GL Acct: 1565.2 WIP Other

Amounts
Gross: 1,275.65
Ret: 0.00 Disc: 0.00 Total: 1,275.65

Info
UM: LS Units: 0.000 UC: 0.00000
Pay Type: 1
Supplier: Desc: SIGNS/BARRICADES

Invoice Review



16. Double-click the blank area. This will open a small window where you can write in your explanation for why you are rejecting or asking for a revision on this item. Once you are done, single-click the “Add” button.

The screenshot displays the 'Invoice Review' application window. At the top, there is a menu bar (File, Edit, Records, View, Options, Tools, Windows, Help) and a toolbar with various icons. Below the menu, the 'Reviewer' field is set to 'EH' (Easton Hamblin). The 'Month' is '01/14' and the 'Seq #' is '1064'. The 'Invoice' field contains 'SIGNS/BARRICADES'. There are buttons for 'Attachments' and 'Invoice Setup'. A red message 'Missing Information' is visible.

The main data grid has columns: Month, Seq#, Vendor, Vendor Name, AP Reference, Invoice Total, Reviewer Total, Approved, Rejected, Reason, Rej Desc, and Invoice Notes. The first row shows data for 01/14, Seq# 1064, Vendor 7291, Vendor Name 'SOUTHWEST SAFETY SERVICES INCORPORATED', AP Reference 45197, Invoice Total 1,275.65, Reviewer Total 1,275.65, and checkboxes for 'Approved' and 'Rejected'.

Below the grid, the 'Line #' is '1' and the 'Line' is 'SIGNS/BARRICADES'. A red message 'Line is Missing Information' is shown. The 'Line Notes' tab is selected, and a yellow rectangular area is highlighted for input.

A 'Time Stamp Notes' dialog box is open in the foreground. It has a title bar '1 Time Stamp Notes' and a toolbar with icons. The dialog contains a large text area for notes, a yellow rectangular area at the bottom, and buttons for 'Print', 'Add', 'Cancel', and 'Close'. The 'Add' button is highlighted with a red border. At the bottom of the dialog, there is a text field 'Enter notes text.' and a 'Co#: 1' label.

Invoice Review



17. Once you are ready to reject the invoice, double-click the check box on the upper-half portion under the “Rejected” column for that item.

File Edit Records View Options Tools Windows Help

Reviewer: **EH** Easton Hamblin

Month: 01/14 Seq #: 1064 SIGNS/BARRICADES Missing Information

Attachments Invoice Setup

Grid	Info	Invoice Notes	Invoice Status							
Month	Seq#	Vendor/ Vendor Name	AP Reference	Invoice Total	Reviewer Total	Approved	Rejected	Reason	Rej Desc	Invoice Notes
01/14	1064	7291 SOUTHWEST SAFETY SERVICES INCORPORATED	45197	1,275.65	1,275.65	☐	☒			

Line #: 1 SIGNS/BARRICADES Line is Missing Information

Grid Info Line Notes Reviewer Notes Other Info

Invoice Review



18. Once you have completed your review of each item, single click the  icon in the upper tool bar.

File Edit Records View Options Tools Windows Help

Reviewer: EH Easton Hamblin

Month: 01/14 Seq #: 1064 SIGNS/BARRICADES

Attachments Invoice Setup

Month	Seq#	Vendor/ Vendor Name	AP Reference	Invoice Total	Reviewer Total	Approved	Rejected	Reason	Rej Desc	Invoice Notes
01/14	1064	7291 SOUTHWEST SAFETY SERVICES INCORPORATED	45197	1,275.65	1,275.65	☒	☐			

Line #:

Grid Info Line Notes Reviewer Notes Other Info

Approve Reject Reason:

Line Type

JC Co: Job:

Phase: CT:

GL

GL Co: GL Acct:

Amounts

Gross: Ret: Disc: Total:

Info

UM: Units: UC:

Pay Type:

Supplier: Desc:

Invoice Review



19. You will know you have reviewed each invoice if the upper-half portion contains no items for review. Close this window. **Note:** These approved invoices will be posted by accounting a few times a week.

File Edit Records View Options Tools Windows Help

Reviewer: EH Easton Hamblin Attachments
Month: Seq #: Invoice Setup

Grid Info Invoice Notes Invoice Status

Month	Seq#	Vendor	Vendor Name	AP Reference	Invoice Total	Reviewer Total	Approved	Rejected	Reason	Rej Desc	Invoice Notes
-------	------	--------	-------------	--------------	---------------	----------------	----------	----------	--------	----------	---------------

Line #:

Grid Info Line Notes Reviewer Notes Other Info

☒ Approve
☐ Reject Reason:

Line Type
JC Co: Job: Phase: CT:

GL
GL Co: GL Acct:

Amounts
Gross: Ret: Disc: Total:

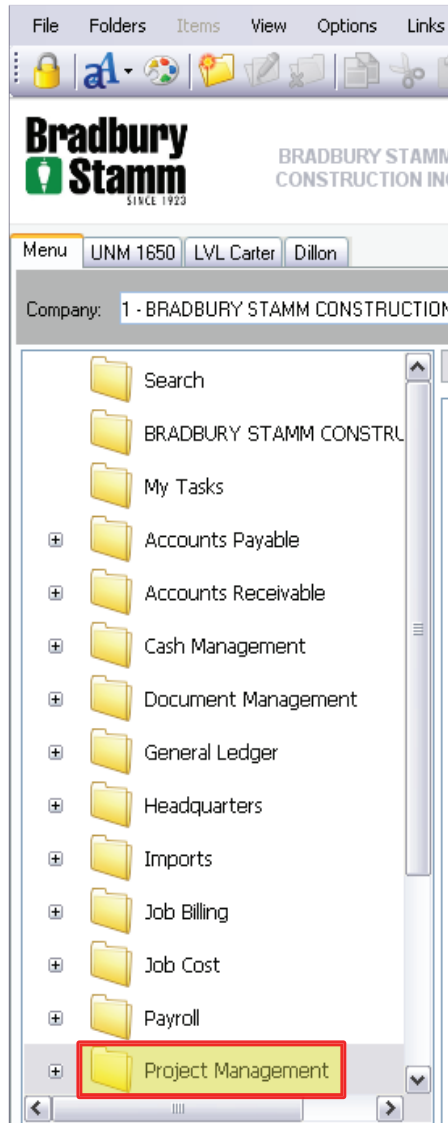
Info
UM: Units: UC: Pay Type: Supplier: Desc:

End of Section

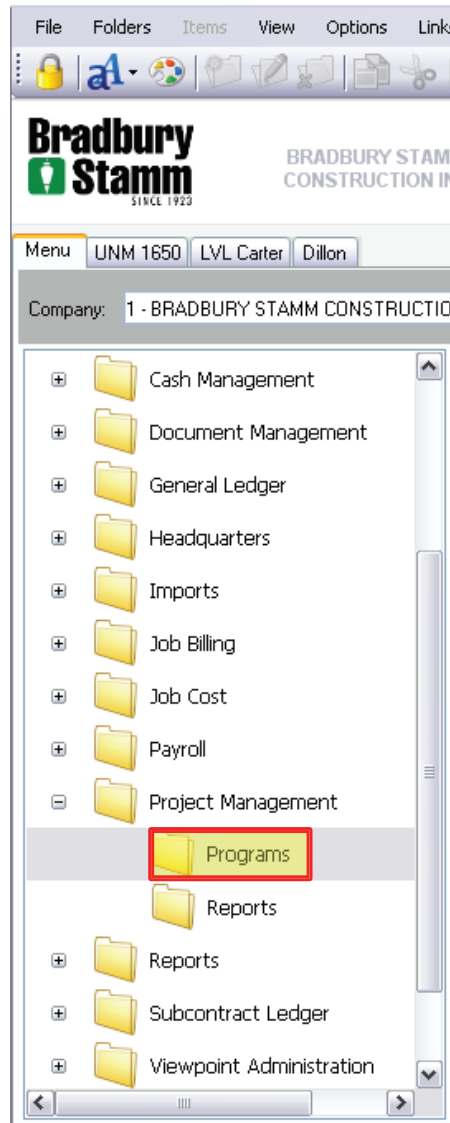
Owner Change Orders



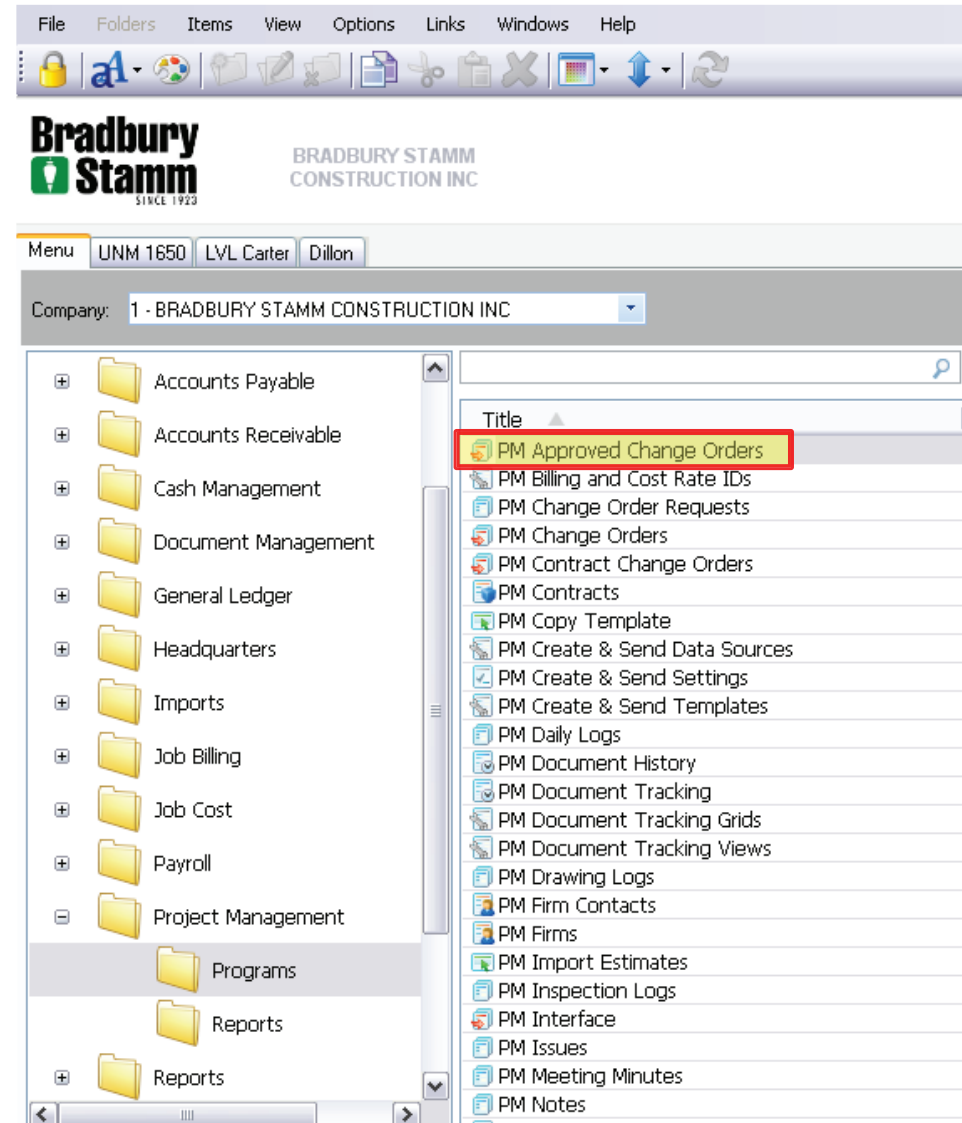
1. Locate and double-click
“Project Management”
from folder panel



2. Locate and single-click
“Programs” from the folder
panel



3. Locate and double-click “PM Approved Change Orders”
from the item list



Owner Change Orders



4. Input your project number in the cell right of "Project:".

File Edit Records View Options Tools Windows Help

Project: **1207.** LVL Carter Hall Revenue : Estimate :
 ACO: Pending: Approved:

No Detail Records

Grid Info History Distribution Notes

ACO	Description	New Cmpl Date	ACO Seq	Bill Group	Bill Group Desc
*					

ACO Item: Pending: Revenue Estimate
 Approved:

Grid Info Estimate Detail Add'l Info History Notes

ACO Item	Description	Contract Item	Contract Item Desc	Amount	UM	Approved	Status	Status Desc
*						☒		

Unapprove Item Close

Owner Change Orders



5. Double-click the open cell below the “ACO” column. Input the owner change number. For example, if this is owner change order #1, input 1. **Note:** This process is also used to do budget revisions. If it is a budget revision, start the budget revision number at “101, 102, 103, etc.” so it does not mix with the owner change orders.

File Edit Records View Options Tools Windows Help

Project: 1207 LVL Carter Hall
ACO:

Revenue: Estimate:
Pending: Approved:

No Detail Records

Grid

Info

History

Distribution

Notes

*	ACO	Description	New Cmpl Date	ACO Seq	Bill Group	Bill Group Desc

<
||||
>

ACO Item:
Pending: Approved:

Revenue: Estimate:

Grid

Info

Estimate Detail

Add'l Info

History

Notes

*	ACO Item	Description	Contract Item	Contract Item Desc	Amount	UM	Approved	Status	Status Desc
							☐		

<
||||
>

Unapprove Item
Close

Owner Change Orders



6. In the cell under the “Description” column, input a description for the item (i.e. “Owner CO #1”).

File Edit Records View Options Tools Windows Help

Project: 1207. LVL Carter Hall

ACO: 1

Pending: Revenue : Estimate : P

Approved:

No Detail Records

Grid Info History Distribution Notes

ACO	Description	New Cmpl Date	ACO Seq	Bill Group	Bill Group Desc	Int/Ext
1			1			E-Extern

ACO Item: Pending: Revenue Estimate

Approved:

Grid Info Estimate Detail Add'l Info History Notes

ACO Item	Description	Contract Item	Contract Item Desc	Amount	UM	Approved	Status	Status Desc	Approve
*						☒			

Unapprove Item Close

Owner Change Orders



7. On the bottom half portion of the window, double-click the cell under the “ACO Item” column. This is where you itemize the different line items contained within the owner change order.

File Edit Records View Options Tools Windows Help

Project: 1207 LVL Carter Hall Revenue : 0.00 Estimate : 0.00
 ACO: 1 Test Pending: 0.00 Approved: 0.00

No Detail Records

Grid Info History Distribution Notes

ACO	Description	New Cmpl Date	ACO Seq	Bill Group	Bill Group Desc
1	Test		1		

ACO Item: Revenue : Estimate :
 Pending: Approved:

Grid Info Estimate Detail Add'l Info History Notes

ACO Item	Description	Contract Item	Contract Item Desc	Amount	UM	Approved	Status	Status Desc
*						☒		

Unapprove Item Close

Owner Change Orders



8. Fill in the information in the empty cells located under columns “Description”, “Contract Item”, and “Amount”.

File Edit Records View Options Tools Windows Help

Project: 1207 LVL Carter Hall

ACO: 1 Test

Pending: Revenue : 0.00 Estimate : 0.00

Approved: Revenue : 0.00 Estimate : 0.00

No Detail Records

Grid Info History Distribution Notes

ACO	Description	New Cmpl Date	ACO Seq	Bill Group	Bill Group Desc
1	Test		1		

ACO Item: 1

Pending: Revenue : Estimate :

Approved: Revenue : Estimate :

Grid Info Estimate Detail Add'l Info History Notes

ACO Item	Description	Contract Item	Contract Item Desc	Amount	UM	Approved	Status	Status Desc
1	Test Item	1.00	Original Contract	0.00	LS	☒	COM	Completed

Unapprove Item Close

Owner Change Orders



9. Single click the “Estimate Detail” tab on the lower portion of the window.

File Edit Records View Options Tools Windows Help

Project: 1207. LVL Carter Hall

ACO: 1 Test

Pending: Revenue : 0.00 Estimate : 0.00

Approved: Revenue : 0.00 Estimate : 0.00

No Detail Records

Grid Info History Distribution Notes

ACO	Description	New Cmpl Date	ACO Seq	Bill Group	Bill Group Desc
1	Test		1		

ACO Item: 1

Pending: Revenue : Estimate :

Approved: Revenue : Estimate :

Grid Info Estimate Detail Add'l Info History Notes

ACO Item	Description	Contract Item	Contract Item Desc	Amount	UM	Approved	Status	Status Desc
1	Test Item	1.00	Original Contract	0.00	LS	☒	COM	Completed

Unapprove Item Close

Owner Change Orders



10. Fill in the information in the empty cells located under columns “Phase”, “Cost Type”, “Phase Description”, and “Estimate Amount”.
For example, each ACO item may have various costs associated with it such as subcontractor pricing, BSC Labor, BSC burden, Tax, etc.
The difference between the ACO Item revenue amount and the estimate amount will be the profit.

File Edit Records View Options Tools Windows Help

Project: 1207. LVL Carter Hall

ACO: 1 Test

Revenue : Estimate :

Pending: 0.00 0.00

Approved: 0.00 0.00

Approved

Grid Info History Distribution Notes

ACO	Description	New Cmpl Date	ACO Seq	Bill Group	Bill Group Desc
1	Test		1		

ACO Item: 1 Test Item

Pending: 0.00 0.00

Curr Est'd Units: Unit Cost: Hours: Costs: Intfc Date:

Grid Info Estimate Detail Add'l Info History Notes

Phase	Cost Type	Phase Description	Estimate Amount	UM	Active	Interface	Notes
					☐	☐	

Unapprove Item
Close

Owner Change Orders



11. Once all of your ACO Items and their associated estimate details have been filled out, the overall ACO can now be finalized.

Click the  icon on the upper toolbar to attach the signed change order to your ACO.

Now interface the ACO via the “PM Interface” program.

File Edit Records View Options Tools Windows Help



Project: 1207. LVL Carter Hall

ACO: 1 Test

Pending: Revenue : 0.00 Estimate : 0.00

Approved: Revenue : 0.00 Estimate : 0.00

No Detail Records

Grid Info History Distribution Notes

ACO	Description	New Cmpl Date	ACO Seq	Bill Group	Bill Group Desc
1	Test		1		

ACO Item: 1

Pending: Revenue : Estimate :

Approved: Revenue : Estimate :

Grid Info Estimate Detail Add'l Info History Notes

ACO Item	Description	Contract Item	Contract Item Desc	Amount	UM	Approved	Status	Status Desc
1	Test Item	1.00	Original Contract	0.00	LS	☒	COM	Completed

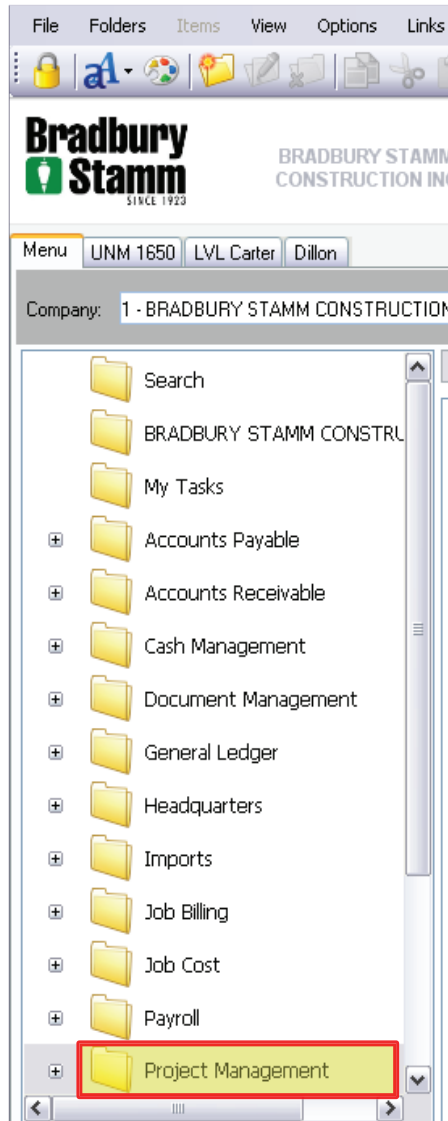
Unapprove Item Close

End of Section

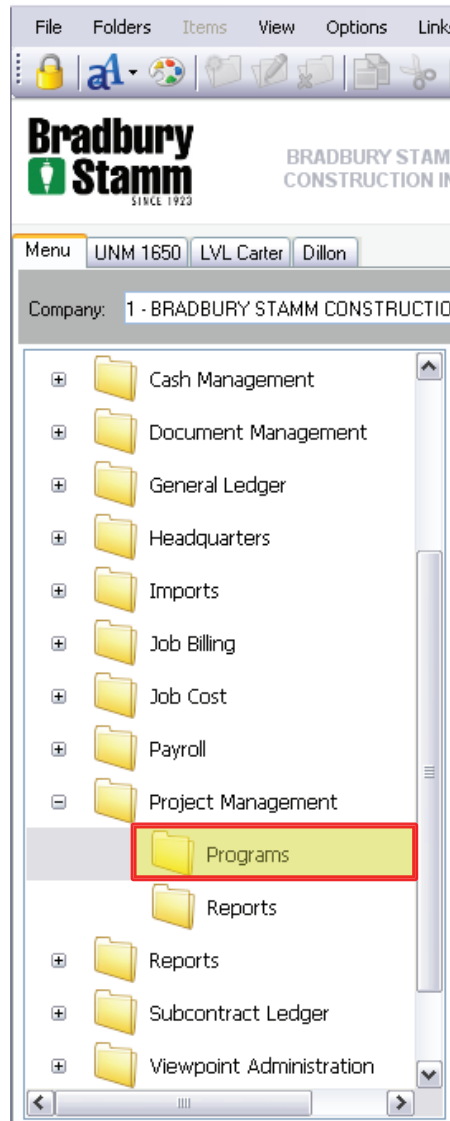
Subcontractor Change Orders



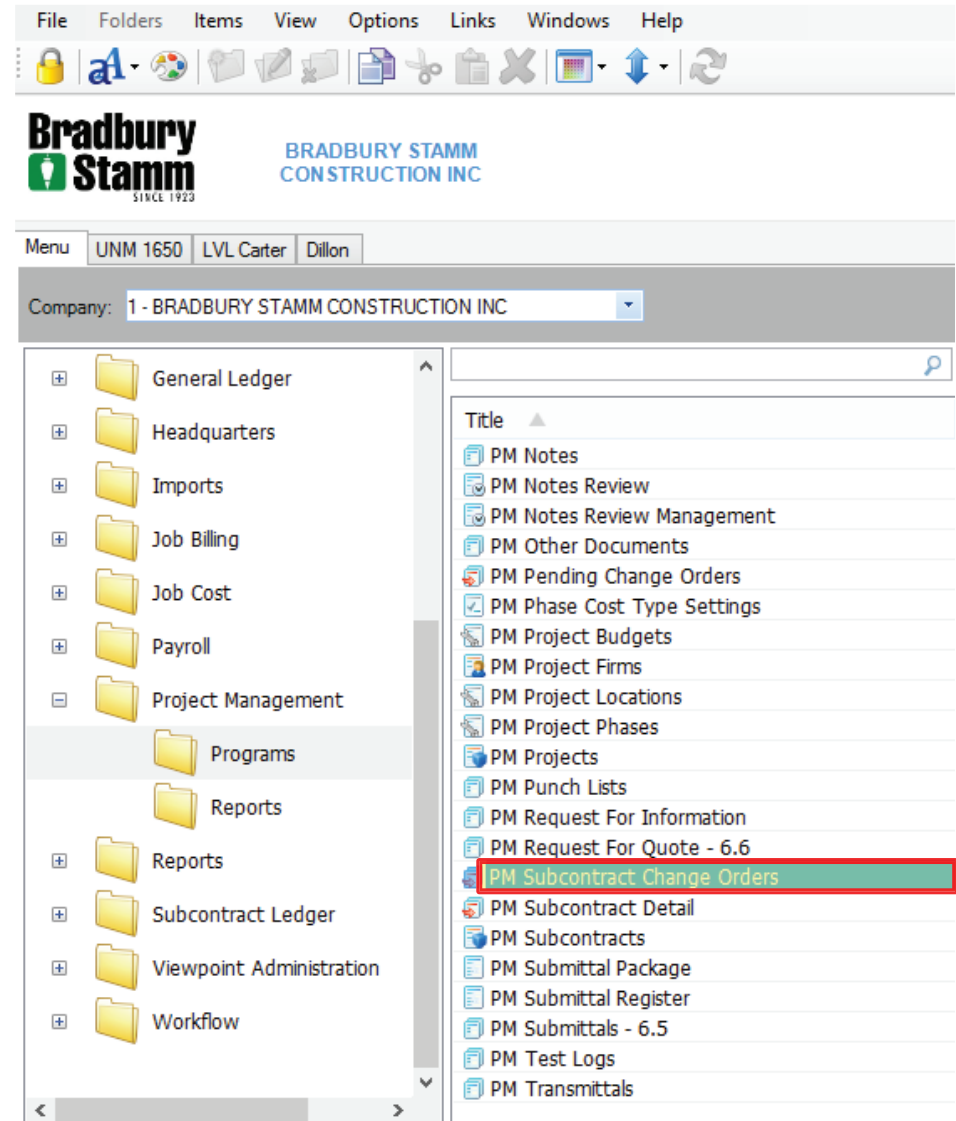
1. Locate and double-click
“Project Management”
from folder panel



2. Locate and single-click
“Programs” from the folder
panel



3. Locate and double-click “PM Subcontract Change Orders”
from the item list



Subcontractor Change Orders



4. Input your project number in the cell right of "Project:". Press the enter key.

File Edit Records View Options Tools Windows Help

Grid

Project: **1212.** La Vida Llena Rio Rancho **Unapproved**

Subcontract: 1207-02.4000-S Demo Contract Vendor:

Subcontract CO: 1

Grid	Info	Totals	Distribution	History	Notes						
* Subcontract	Subcontract CO	Description	Details	Date	Ready f						
Seq:											
Grid	Info	Notes									
* Seq	Sub It	Description	Phase	Cost Type	Amount	Interface	Notes	Tax Type	Tax Code	WC Ret %	SM
0.00											
Approve Close											

Subcontractor Change Orders



5. Single click inside the empty cell at the bottom marked with an “*” symbol. Hit the “F4” keyboard function button to bring up a list of current interfaced subcontracts on your project in a separate window.

File Edit Records View Options Tools Windows Help

Project: 1207. LVL Carter Hall Approved Interfaced: 12/4/13

Subcontract: 1207-06.2000-S Finish Carpentry Subcontract Vendor: OGB ARCH MILLWORK

Subcontract CO: 2 CO #2 OGB

Grid Info Totals Distribution History Notes

Subcontract	Subcontract CO	Description	Details	Date	Reac
1207-26.1000-S	6	CO #6 Service Elec.		3/21/14	
1207-3.3000-S	1	CO #1 Mayan		6/6/13	
1207-3.3000-S	2	CO #2 Mayan		7/18/13	
1207-3.3000-S	3	CO #3 Mayan		11/13/13	
1207-3.3000-S	4	CO #4		2/17/14	
1207-31.2000-S	1	Earthwork Change Order 001	Earthwork Change Order 001	4/22/13	
1207-31.2000-S	2	CO #2		10/29/13	
1207-31.2000-S	3	CO #3 Desert Utility & Paving		11/13/13	
1207-32.9000-S	1	CO #1		2/12/14	
1207-32.9000-S	2	CO #2 Groundskeeper		3/21/14	
* [Empty Cell]					

Seq: 73 CO #2 OGB

Grid Info Notes

Seq	Sub It	Description	Phase	Cost Type	Amount	Interface	Notes	Tax Type	Tax Code	WC Ret %	SM
73	8	CO #2 OGB	06.2000.	4	-363.00	✓	To furnish material, labor, equipment			0.00 %	
74	9	CO #2 OGB	06.2000.	4	-2,231.00	✓	To furnish material, labor, equipment			0.00 %	
75	10	CO #2 OGB	06.2000.	4	789.00	✓	To furnish material, labor, equipment			0.00 %	
76	11	CO #2 OGB	06.2000.	4	941.00	✓	To furnish material, labor, equipment			0.00 %	
Totals											
					-864.00						

Unapprove Close

Subcontractor Change Orders



6. From this window, locate and double-click the subcontract in which you will be writing a change order for.

Approved Subcontracts by Job Lookup

Select One:

☒ Approved Subcontracts by Job

☐ SL Change orders for Project

☐ Pending/Open Subcontracts

Subcontract	Description
1207-02.4000-S	Demo Contract
1207-03.3001-S	Helical Pier Subcontract
1207-04.2200-S	Masonry Subcontract
1207-05.1000-M	Steel Material Contract
1207-05.1000-S	Steel Erection Contract
1207-06.2000-S	Finish Carpentry Subcontract
1207-07.2100-S	Insulation and Joint Sealant Contract
1207-07.5400-S	Roofing Subcontract
1207-08.1000-M	Doors & Hardware Subcontract
1207-08.1000-S	Door Install Contract

Setup OK Cancel

Subcontractor Change Orders



7. From this original window, the subcontract change order number will auto fill under the “Subcontract CO” column. Underneath the “Description” column, input a description for the change order item or package you will be creating.

File Edit Records View Options Tools Windows Help

Grid

Project: 1207. LVL Carter Hall Approved

Subcontract: 1207-02.4000-S Demo Contract Vendor: HUDSPETH & ASSOCIATES INC

Subcontract CO: 2

Subcontract	Subcontract CO	Description	Details	Date	Reac
1207-26.1000-S	6	CO #6 Service Elec.		3/21/14	
1207-3.3000-S	1	CO #1 Mayan		6/6/13	
1207-3.3000-S	2	CO # 2 Mayan		7/18/13	
1207-3.3000-S	3	CO #3 Mayan		11/13/13	
1207-3.3000-S	4	CO #4		2/17/14	
1207-31.2000-S	1	Earthwork Change Order 001	Earthwork Change Order 001	4/22/13	
1207-31.2000-S	2	CO #2		10/29/13	
1207-31.2000-S	3	CO #3 Desert Utility & Paving		11/13/13	
1207-32.9000-S	1	CO #1		2/12/14	
1207-32.9000-S	2	CO #2 Groundskeeper		3/21/14	
1207-02.4000-S	2			4/3/14	

Seq:

Seq	Sub It	Description	Phase	Cost Type	Amount	Interface	Notes	Tax Type	Tax Code	WC Ret %	SM
Totals											
					0.00						

Unapprove Close

Subcontractor Change Orders



8. Single-click on the “info” tab to begin entering further information.

File Edit Records View Options Tools Windows Help

Grid

Project: 1207. LVL Carter Hall Unapproved

Subcontract: 1207-02.4000-S Demo Contract Vendor: HUDSPETH & ASSOCIATES INC

Subcontract CO: 2 CO #2 Hudspeth

Grid Info Totals Distribution History Notes

Subcontract	Subcontract CO	Description	Details	Date	Read
1207-3.3000-S	1	CO #1 Mayan		6/6/13	
1207-3.3000-S	2	CO #2 Mayan		7/18/13	
1207-3.3000-S	3	CO #3 Mayan		11/13/13	
1207-3.3000-S	4	CO #4		2/17/14	
1207-31.2000-S	1	Earthwork Change Order 001	Earthwork Change Order 001	4/22/13	
1207-31.2000-S	2	CO #2		10/29/13	
1207-31.2000-S	3	CO #3 Desert Utility & Paving		11/13/13	
1207-32.9000-S	1	CO #1		2/12/14	
1207-32.9000-S	2	CO #2 Groundskeeper		3/21/14	
1207-02.4000-S	2	CO #2 Hudspeth		4/3/14	

Seq:

Grid Info Notes

Seq	Sub It	Description	Phase	Cost Type	Amount	Interface	Notes	Tax Type	Tax Code	WC Ret %	SM
*						☐					
Totals											
					0.00						

Approve Close

Subcontractor Change Orders



9. In the lower half portion of this window, select within the empty cell under column "Sub Item" and input "N". This will auto fill this item. Typically the subcontract itself is item #1, followed by individual subcontract change items. In this instance, this is subcontractor change order #2, but this is item #5. Change order #1 had a package of three items (#2, #3, and #4).

File Edit Records View Options Tools Windows Help

Project: 1207. LVL Carter Hall Unapproved

Subcontract: 1207-02.4000-S Demo Contract Vendor: HUDSPETH & ASSOCIATES INC

Subcontract CO: 2 CO #2 Hudspeth

Grid Info Totals Distribution History Notes

Description: CO #2 Hudspeth

Details:

Document Type: SUBCO Default for SUBCO

Date: 4/3/14 Status: REQ Required

Reference: ☐ Ready for Accounting

Sent: Sub Signed Date: BSC Signed Date: Approved:

Compliance Interface C/O

Seq:

Grid Info Notes

Seq	Sub Item	Description	Phase	Cost Type	Amount	Interface	Notes	Tax Type	Tax Code	WC Ret %	SM
*						☐					
					0.00						

Totals

< >

Approve Close

Subcontract Change Orders



10. Fill out the empty cells under columns “Phase” (should be tied to your budget phase code), “Cost Type” (3 for material contract and 4 for subcontract), and “Amount” (the amount of the change order item).

File Edit Records View Options Tools Windows Help

Project: 1207. LVL Carter Hall

Subcontract: 1207-02.4000-S Demo Contract Unapproved

Subcontract CO: 2 CO #2 Hudspeth Vendor: HUDSPETH & ASSOCIATES INC

Grid Info Totals Distribution History Notes

Description: CO #2 Hudspeth

Details:

Document Type: SUBCO Default for SUBCO

Date: 4/3/14 Status: REQ Required

Reference: ☐ Ready for Accounting

Sent:

Sub Signed:

Date:

BSC Signed:

Date:

Approved:

Compliance
Interface C/O

Seq: 155

Grid Info Notes

Seq	Sub It	Description	Phase	Cost Type	Amount	Interface	Notes	Tax Type	Tax Code	WC Ret %	SM
155	5	CO #2 Hudspeth			0.00	☑				0.00 %	
						☐					
Totals					0.00						

< > < >

Approve
Close

Subcontractor
Change Orders



11. In the empty cell below the “Notes” column, input a detailed description of the change item.

File Edit Records View Options Tools Windows Help

Project: 1207. LVL Carter Hall Unapproved

Subcontract: 1207-02.4000-S Demo Contract Vendor: HUDSPETH & ASSOCIATES INC

Subcontract CO: 2 CO #2 Hudspeth

Grid Info Totals Distribution History Notes

Description: CO #2 Hudspeth

Details:

Document Type: SUBCO Default for SUBCO

Date: 4/3/14 Status: REQ Required

Reference:

☐ Ready for Accounting

Sent: Sub Signed Date: BSC Signed Date: Approved:

Compliance Interface C/O

Seq: 155

Grid Info Notes

Seq	Sub It	Description	Phase	Cost Type	Amount	Interface	Notes	Tax Type	Tax Code	WC Ret %	SM
155	5	CO #2 Hudspeth	02.4000.	4	1.00	☒				0.00 %	
Totals											
					0.00						

Approve Close

Subcontractor Change Orders



12. Once that is input, you can add more change items for this subcontract if applicable (repeat #9-#11) or continue to process this subcontractor change order. Single-click the “Approve” button.

File Edit Records View Options Tools Windows Help

Project: 1207. LVL Carter Hall
Subcontract: 1207-02.4000-S Demo Contract
Subcontract CO: 2 CO #2 Hudspeth

Unapproved
Vendor: HUDSPETH & ASSOCIATES INC

Grid Info Totals Distribution History Notes

Description: CO #2 Hudspeth
Details:

Sent:
Sub Signed Date:
BSC Signed Date:
Approved:

Document Type: SUBCO Default for SUBCO
Date: 4/3/14 **Status:** REQ Required

Reference:☐ Ready for Accounting

Compliance

Interface C/O

Seq: 155

Grid Info Notes

Seq	Sub It	Description	Phase	Cost Type	Amount	Interface	Notes	Tax Type	Tax Code	WC Ret %	SM
155	5	CO #2 Hudspeth	02.4000.	4	1.00	☒	To remove door 101A.			0.00 %	
					0.00						
< > < >											

Approve

Close

Subcontractor Change Orders



13. Single-click the “Interface C/O” button. Please note that once this change order has been interfaced, only accounting can make corrections to the contents. If time passes and corrections need to be made, they can only do so by creating another subcontractor CO to offset it.

File Edit Records View Options Tools Windows Help

Project: 1207. LVL Carter Hall
Subcontract: 1207-02.4000-S Demo Contract
Subcontract CO: 2 CO #2 Hudspeth

Unapproved
Vendor: HUDSPETH & ASSOCIATES INC

Grid Info Totals Distribution History Notes

Description: CO #2 Hudspeth
Details:
Document Type: SUBCO Default for SUBCO
Date: 4/3/14 **Status:** REQ Required
Reference:☐ Ready for Accounting

Sent:
Sub Signed Date:
BSC Signed Date:
Approved:

Compliance

Interface C/O

Seq: 155 CO #2 Hudspeth

Grid Info Notes

Seq	Sub It	Description	Phase	Cost Type	Amount	Interface	Notes	Tax Type	Tax Code	WC Ret %	SM
155	5	CO #2 Hudspeth	02.4000.	4	1.00	☒	To remove door 101A.			0.00 %	
Totals					1.00						

Approve

Close

Subcontractor Change Orders



14. In this interface window, confirm the job number and item is correct. Single click the “Validate” button followed by the “Interface” button. Close this window.

1 PM Interface for BRADBURY STAMM CONSTRUCTION INC

File Edit Records Options Tools Windows Help

Filter by Project and Item Type

Project: 1207. LVL Carter Hall

Item Type: 1 - All INCo:

Keyword:

Interface	ID	Description	CO Number
☒ Subcontract CO	1207-26.1000-S	Electrical Contract	6

Select All Deselect All

Month: 04/14 Validate Clear

Audit Reports

☐ Job Cost ☐ Purchase Orders ☐ Material Orders ☐ Error List

☐ Contracts ☐ Subcontracts ☐ Material Quotes Preview Print

Attach Batch Reports to HQ Batch Control: Yes

Interface Close

Subcontractor Change Orders



15. Single-click the “Distribution” tab.

File Edit Records View Options Tools Windows Help

Project: 1207. LVL Carter Hall **Unapproved**

Subcontract: 1207-02.4000-S Demo Contract Vendor: HUDSPETH & ASSOCIATES INC

Subcontract CO: 2 CO #2 Hudspeth

Grid Info Totals **Distribution** History Notes

Description: CO #2 Hudspeth

Details:

Document Type: SUBCO Default for SUBCO

Date: 4/3/14 Status: REQ Required

Sent: Sub Signed Date: BSC Signed Date: Approved:

Subcontractor Change Orders



16. Next single-click the empty cell underneath the “Send To Firm” column. Hit the keyboard function key “F4”.

The screenshot shows the main application window with the following data:

- Project: 1207. LVL Carter Hall
- Subcontract: 1207-02.4000-S Demo Contract
- Subcontract CO: 2 CO #2 Hudspeth
- Vendor: HUDSPETH & ASSOCIATES INC

The 'Firm Master Lookup' dialog box is open, showing the following options:

- Select One:
 - ☒ Firm Master
 - ☐ All Active Firms
 - ☐ Project Firms
- Firm Name: Intercon
- Intercon Company, LLC (selected)

17. This will bring up a small window. Type in and locate the subcontractor or material contractor “Firm”. Double-click your selection. *Note: “Firm” and “Vendor” are two different databases. In our instance, your “Firm” will be the same company as your “vendor”.*

18. Next single-click the empty cell underneath the “Send To Contact” column. Hit the keyboard function key “F4”.

The screenshot shows the main application window with the following data:

- Project: 1207. LVL Carter Hall
- Subcontract: 1207-02.4000-S Demo Contract
- Subcontract CO: 2 CO #2 Hudspeth
- Vendor: HUDSPETH & ASSOCIATES INC

The 'PM Firm Contacts - Active Lookup' dialog box is open, showing the following options:

- Select One:
 - ☒ PM Firm Contacts - Active
 - ☐ Project Firm Contacts
- Contact: Contact Name
- 1 Frank Lopez (selected)

19. This will bring up a small window. Double-click an available contact. *Note: If there is no contact available, you can create one. By single-clicking the “setup” button.*

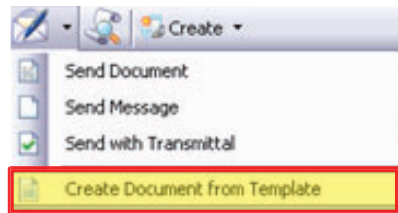
Subcontractor Change Orders



20. Now we are ready to generate the subcontract change order. Single-click the downward arrow to the right of the “envelope” icon above

The screenshot shows the main application window with a menu bar (File, Edit, Records, View, Options, Tools, Windows, Help) and a toolbar. The 'Create' button in the toolbar is highlighted with a red box. Below the toolbar, the 'Project' field is set to '1207. LVL Carter Hall', 'Subcontract' to '1207-02.4000-S Demo Contract', and 'Subcontract CO' to '2 CO #2 Hudspeth'. The 'Vendor' field is 'HUDSPETH & ASSOCIATES INC'. The status is 'Unapproved'. Below this, there is a table with columns: Sent To Firm, Firm Name, Sent To Contact, Contact Name, Send, Preferred Method, Send Type, Date Sent, Date Signed, and Notes. The first row shows '1370 Intercon Company, 1 Frank Lopez' with 'M - Print' as the preferred method.

21. From the dropdown, single-click “Create Document from Template”



22. A new window will appear. Next to the words “Template:”, use the drop down to locate “BSC Subcontract Change Order (test)”.

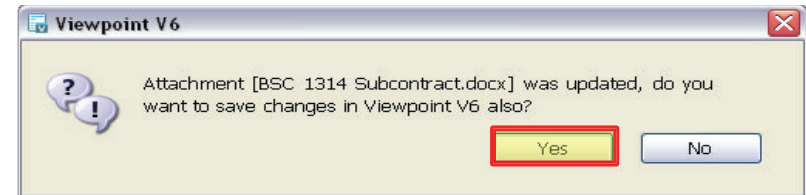
This image shows the '1 Create Document from Template' window. The 'Template' dropdown is set to 'BSC Subcontract Change Order (test)'. Below this, there are options to 'Select Document Creation Type': 'Attach Document to Parent' (selected) and 'Save Generated Document'. The 'Attachment Name' is 'BSC Subcontract Change Order (test).docx'. There is a 'Generated Document' field and a 'Save As...' button. At the bottom, there is a checkbox for 'Open Created Document in Word' and 'Create...' and 'Close' buttons.

23. Once your template is selected, single-click the “Create...” button. This may take a minute to generate the custom word file.

This image shows the '1 Create Document from Template' window, similar to the previous one, but with the 'Create...' button highlighted with a red box. The 'Template' is still 'BSC Subcontract Change Order (test)' and the 'Attach Document to Parent' option is selected.



24. Once you have verified the information is correct, click the “save” icon in word. An alert window will pop-up asking if you want to save changes in Viewpoint. Single-click “Yes”. This will attach this word file to the subcontract change order you just created.



25. After you have saved it and before you close the word file, save the word file as a .PDF document to a temporary folder. From there, attach this .PDF fill to an email in Outlook addressed to the subcontractor/supplier key contact. In the body of the email direct them to sign and email back to you.

26. When you receive the .PDF back signed by the subcontractor/supplier, verify no revisions have been made, sign, and email back to your key contact the executed file. Make sure you CC your project tech and include the word “Signed” in the subject line to notify them to then upload the signed subcontract onto Viewpoint. Project techs will then indicate compliance for this signed subcontract in Textura. **Note: Subcontractors cannot receive payment until these steps are completed.**