PROJECT MANAGER VIEWPOINT MANUEL







Construction Since

Bradbury Stamm

PM VIEWPOINT MANUAL Updated 2019 Owner/BSC contract input



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

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Owner/BSC contract input

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

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122	23.003	On-Call	Primary	Pump House	e 2 Scum	Valve	
122	23.004	On-Call	MDC To	wer Fall Pro	t Sys Rep	air	
122	23.005	On-Call	SJC Lea	k @ South F	ilter		
122	23.006	On-Call	SJC 8" 0)rain Line fo	r Dewate	ring	
122	23.007	On-Call	SJC Lea	k Repair			
122	23.008	On-Call	Clarifier	6 Gate Rep	air		
122	23.009	On-Call	Dewate	r			
130	D1.	Grants	HS Perfo	rming Arts (Ienter		
130	02.	Railyard	l Blacksn	nith Shop			
130	03.	Buckma	n Photov	/oltaic			
130	04.	NMSBVI	-New Ed	lucation Bldg)		
130	05.	Laguna	Rainbov	v Village			
130	07.	Concho	West-A	rtesia Office	e & Hange	r Improveme	ents
130	08.	Springe	r Building	g Mixed Use			
130	09.	ABQ Up	town Pro	ojects			
131	10.	El Capit	an Eleme	entary - Ros	well		
131	11.	Capitan	High Sc	hool			
131	12.	Estancia	a Middle	School -Ren	ov/Add		
131	13.	SFCC P	notovolt	aic			
131	14.	Dillion H	all Phase	e 2			
131	15.	BCBS 44	111 The	25 Way			
131	16.	Atalaya	Element	tary Santa P	e		
131	17.	Isleta A	ssisted L	iving & Elde.	rly Care		
131	18.	Albug C	onventio	on Center Ri	emodel		
131	19.	JWLA -	Renoval	tion & Additi	on		
132	20.	FCCH -	Belen Re	emodel			
132	21.	Manzan	o Day Si	chool-La Glo	rieta		
132	22.	NMIMT	Geology	Building			
132	23.	Chaves	Cty Det	ention Ctr R	eno/Add	n	
132	25.	Belen E	agles Na	tatorium			
331	13.	Teacher	rages - l	Jtilities			
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5. Scroll down to look for your job by number under the "Contract" column. Single-click your specific project

File	Edit	Reco	ords View	Options	Tools	Windows	Help			
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Contra	act:	1314.	6)illion Hall Pha	ise 2					
Grid	Info		Items JB I	nfo 🗍 JB Bill N	lotes	Notes F	orecast			
Co	ntract	De	escription				1			
12	23.003	0	n-Call Primary	/ Pump House	2 Scum	Valve				
12	23.004	0	n-Call MDC To	ower Fall Prot	: Sys Rep	air				
12	23.005	0	n-Call SJC Le	ak @ South F	ilter					
12	23.006	0	n-Call SJC 8"	Drain Line foi	r Dewate	ring				
12	23.007	0	n-Call SJC Le	ak Repair						
12	23.008	0	n-Call Clarifie	r 6 Gate Rep	air					
12	23.009	0	n-Call Dewate	er						
13	01.	Gr	rants HS Perf	orming Arts C	Ienter					
13	02.	Ra	ailyard Blacks	mith Shop						
13	03.	Bu	Buckman Photovoltaic							
13	04.	N	MSBVI-New E	ducation Bldg	1					
13	05.	La	aguna Rainbo	w Village						
13	07.	Co	oncho West-A	Artesia Office	& Hange	er Improveme	ents			
13	08.	Sp	Springer Building Mixed Use							
13	09.	A	ABQ Uptown Projects							
13	10.	E	El Capitan Elementary - Roswell							
13	11.	Ca	Capitan High School							
13	12.	Es	stancia Middle	e School -Ren	ov/Add					
13	13.	SF	FCC Photovol	taic						
13	14.	Di	illion Hall Phas	;e 2						
13	15.	BC	CBS 4411 The	e 25 Way						
13	16.	At	talaya Elemer	ntary Santa F	e					
13	17.	Is	leta Assisted	Living & Elde	rly Care					
13	18.	Al	lbuq Convent	ion Center Re	emodel					
13	19.	JV	WLA - Renova	ation & Additi	on					
13	20.	FC	CCH - Belen R	temodel						
13	21.	M	anzano Day S	5chool-La Gloi	rieta					
13	22.	N	MIMT Geology	y Building						
13	23.	Cł	haves Cty De	tention Ctr R	eno/Add	n				
13	25.	Be	elen Eagles N	atatorium						
33:	113.	Te	eacherages -	Utilities						
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6. Locate and single-click "Info" from the upper tabs

File	Edit	Re	ecords	View	Options	Tools	Windows	Help		
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Contra	act:	131	4.	Di	llion Hall Pha	ase 2				
Grid	Info		🚺 Item	s 🛛 JB In	fo 🗍 JB Bill N	lotes	Notes F	orecas		
Cor	ntract		Descrip	tion						
122	23.003		On-Call	Primary	Pump House	e 2 Scum	Valve			
122	23.004		On-Call	MDC To	wer Fall Pro	t Sys Rep	air			
122	23.005		On-Call	SJC Lea	k @ South F	ilter				
122	23.006		On-Call	SJC 8" D)rain Line fo	r Dewate	ring			
122	23.007		On-Call	SJC Lea	k Repair					
122	23.008		On-Call	Clarifier	6 Gate Rep	air				
122	23.009		On-Call	Dewate	r					
130	D1.		Grants I	HS Perfo	rming Arts (Ienter				
130	02.		Railyard	l Blacksn	hith Shop					
130	03.		Buckma	n Photov	/oltaic					
130	04.		NMSBVI	-New Ed	lucation Bldg	,				
130	05.		Laguna	Rainbov	v Village					
130	07.		Concho	West-A	rtesia Office	e & Hange	er Improvem	ients		
130	08.		Springer Building Mixed Use							
130	09.		ABQ Up	town Pre	ojects					
131	10.		El Capit	an Eleme	entary - Ros	well				
131	11.		Capitan	High Sc	hool					
131	12.		Estancia	a Middle	School -Ren	ov/Add				
131	13.		SFCC P	hotovolt	aic					
131	14.		Dillion H	all Phase	92					
131	15.		BCBS 44	411 The	25 Way					
131	16.		Atalaya	Element	ary Santa F	e				
131	17.		Isleta A	ssisted L	iving & Elde.	rly Care				
131	18.		Albuq C	onventio	on Center Ri	emodel				
131	19.		JWLA -	Renoval	ion & Additi:	on				
132	20.		FCCH -	Belen Re	emodel					
132	21.		Manzan	o Day Se	chool-La Glo	rieta				
132	22.		NMIMT	Geology	Building					
132	23.		Chaves	Cty Det	ention Ctr R	eno/Add	n			
132	25.		Belen E	agles Na	tatorium					
331	13.		Teacher	rages - L	Jtilities					
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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.

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Contract: 1314.	Dillion I	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		- Status -		
Department:	200	Commercial Dept	Contrac	t Status:	1-Open 🗸
Customer:	1041		Contrac	t Start Month:	06/13 🚔
New Mexico School	for the Deaf		Month C	losed:	
Pay Terms:	30	Net 30th	Projecte	d Completion Date:	6/16/14 🕎
Dflt Retainage %:	0.00%	Bill Day: 25th	Actual C	lose Date:	(12)
			Dausiau	Contract	
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Tax Code:	01-123	Santa Fe	Original	: 309 Cu	rrent: 322
Interface Taxes	s		_Standar	d Item Codec	
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% of Contract:	0.00%	Retainage Amount: 0.00			
Max Amt by %:		✓ Incl Chg Orders in Max Ret %			
Adjust Maximum Bi	II: C-Composit	te Percentage same on all Items 🛛 🖌			

Owner/BSC contract input



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.

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Cont	ract: 1314.	Dillion Hall Phase 2		Total Orig	. Contract:	5,630,077.50						
				Total Curr	. Contract:	5,798,366.26						
Grid	Info 📗 Iter	ms JB Info JB Bill Notes	Notes Forecast									
It	em	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".

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Contract: 13	14. Dillion	n Hall Phase 2			Total O	rig. Contract:	5,630,077.50						
					Total Co	urr. Contract:	5,798,366.26						
Grid Info	🗾 Items 🛛 JB Info	JB Bill Notes	Notes Fo	precast									
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 I	Phase 2	Dillion Hall Ph	iase 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 - H	Health Services	Dillion Hall - Health Services	01-123	Santa Fe	LS	0.000	0.00000	272,632.50	06/13	0.00 %
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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.

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4. Single-click the "Grid" tab. Note that some General Condition items are already input as a default for new projects. These items can be deleted if undesired or unused.

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Project: 1212	La Vida Ller	na Rio Rancho
Phase: 01.10	100. F	Project Manager
	L	
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Grid Info Co	ost Types Notes	Roles
Phase	Phase Desc	Description
01.1000.	Project Manager	Project Manager
01.1012.	Project Engineer	Project Engineer
01.1024.	Project Technician	Project Technician
01.1116.	Blue Prints & Specif	Blue Prints & Specifications
01.1156.	Building Permit	Building Permit
01.1196.	Project Reports	Project Reports
01.1200.	Construction Photo	Construction Photos/Videos
01.1204.	Testing	Testing
01.1238.	Trucking & Hauling	Trucking & Hauling
01.1240.	Safety Program	Safety Program
01.1252.	Temp Electrical Ser	Temp Electrical Service
01.1260.	Temp Lighting	Temp Lighting
01.1266.	Temp Water (Const	Temp Water (Construction)
01.1272.	Temp Fire Protectio	Temp Fire Protection Extinguishers
01.1292.	Cellular Phones	Cellular Phones
01.1312.	Temp Fences - Con	Temp Fences - Construction
01.1328.	Dumpsters & Haul	Dumpsters & Haul off
01.1336.	Clean Up Labor/Go-	Clean Up Labor/Go-Fer
01.1404.	Final Cleaning Subc	Final Cleaning Subcontractor
01.1412.	Project ID Signs	Project ID Signs
01.1416.	Field Office Rental	Field Office Rental & Set Up
01.1420.	Field Storage Traile	Field Storage Trailer(s)
01.1428.	Office Supplies	Office Supplies
01.1432.	Office Equipment	Office Equipment
01.1436.	Computer Equipme	Computer Equipment
01.1448.	Temp HVAC/Heat	Temp HVAC/Heat
01.1452.	Weather Conditions	Weather Conditions
01.1468.	Project Record Doc	Project Record Documents & As Builts
01.1476.	Warranties	<

5. Begin inputting each desired phase that you will assign budgets to. Do this by clicking the cell right next to the

"*". Once you have clicked that cell, hit function keyboard button "F4". This will bring up a small window. File Edit Records View Options Tools Windows Help



Grid	Info 🤇 🤇	Cost Types	Notes	Roles	
Phas	se	Phase Des	c 🔤	Descriptio	n
01.1	266.	Temp Wat	er (Const	Temp Wa	ter (Construction)
01.1	272.	Temp Fire	Protectio	Temp Fire	e Protection Extinguishers
01.1	292.	Cellular Ph	ones	Cellular P	hones
01.1	312.	Temp Fend	es - Con	Temp Fer	nces - Construction
01.1	328.	Dumpsters	& Haul	Dumpster	rs & Haul off
01.1	336.	Clean Up L	abor/Go-	Clean Up	Labor/Go-Fer
01.1	404.	Final Clear	ning Subc	Final Clea	ning Subcontractor
01.1	412.	Project ID	Signs	Project II) Signs
01.1	416.	Field Office	e Rental	Field Offi	ce Rental & Set Up
01.1	420.	Field Stora	ge Traile	Field Stor	age Trailer(s)
01.1	428.	Office Sup	plies	Office Su	pplies
01.1	432.	Office Equ	ipment	Office Eq	uipment
01.1	436.	Computer	Equipme	Computer	r Equipment
01.1	448.	Temp HVA	C/Heat	Temp HV/	AC/Heat
01.1	452.	Weather C	onditions	Weather	Conditions
01.1	468.	Project Re	cord Doc	Project R	ecord Documents & As Builts
01.1	476.	Warranties	5	Warrantie	es
01.1	480.	Small Tool:	s & Repa	Small Too	ls & Repairs
01.1	482.	Reproduct	ions/Print	Reproduc	tions/Printing
01.1	484.	Fed-X & Po	ostage Co	Fed-X & F	Postage Costs
01.1	494.	AGC Dues		AGC Due:	5
01.1	496.	Payment 8	Perform	Payment	& Performance Bonds
01.1	504.	Buillders R	isk Insur	Buillders R	Risk Insurance
60.1	000.	Project Ma	nager - P	Project M	anager - Precon
60.1	008.	Assistant P	roject M	Assistant	Project Manager - Precon
60.1	040.	Senior Esti	mator -	Senior Es	timator - Precon
60.1	044.	Estimator -	Precon	Estimator	- Precon
*					
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7. Locate and single-click your desired phase you want to add to apply a budget amount to.

🥸 Phase Master Lookun



can double-click the item).

📀 Pha	se Master							
🔿 Proj	ect Phases							
Phase	Description							
03.2000.	Concrete Reinforcing							
03.2300.	Stressing Tendons							
03.3000.	Cast In Place Concrete - Full Package	ĺ						
03.3001.	Cast-In-Place Concrete - Building	1						
03.3002.	Cast-In-Place Concrete - Site Package Only	C						
03.3005.	Concrete Encasement of Pipe							
03.3100.	Concrete Collars / Cleanouts, etc.							
03.3125.	uilding 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 Concrtete							
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	ĺ						
<		l						

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 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.

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Select Or	ne:							
Phase Master								
O Project Phases								
	561110505							
Phase	Description	ר						
		7						
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	1						
00.1048.	Project Superintendent Salary / Costs - GC	1						
00.1052.	Project Superintendent Per Diem							
00.1056.	Assistant Superintendent 1 - GC	1						
00.1060.	Assistant Superintendent 1 Per Diem - GC							
00.1064.	Assistant Superintendent 2 - GC	1						
00.1066.	Assistant Superintednent 2 Per Diem - GC							
00.1116.	Plans & Specifications - GC							
00.1152.	LEED - GC	1						
00.1156.	Permits - GC	1						
00.1232.	Registered Survey - GC							
00.1238.	Trucking and Hauling - GC	4						
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Se	tup OK Cancel							

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Select Or	ne: :e Master ect Phases
hase	Description
13.2000.	Concrete Reinforcing
3.2300.	Stressing Tendons
3.3000.	Cast In Place Concrete - Full Package
3.3001.	Cast-In-Place Concrete - Building
3.3002.	Cast-In-Place Concrete - Site Package Only
3.3005.	Concrete Encasement of Pipe
3.3100.	Concrete Collars / Cleanouts, etc.
3.3125.	Building Concrete Layout
3.3126.	Site Concrete Layout
3.3543.	Polished Concrete
3.3800.	Post Tensioned Concrete
3.4100.	Precast Structural Concrete
3.4500.	Precast Architectural Concrtete
3.4800.	Precast Concrete Specialties
)3.4813.	Precast Concrete Bollards
3.4816.	Precast Concrete Splash Blocks
3.4819.	Precast Concrete Stair Treads
3.5216.	Lightweight Insulating Concrete
3.5300.	
<	
Se	tup OK Cancel



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.

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Project: 1212.	. La Vida Ller	a Rio Rancho	7	Project Total:	0.00
Phase: 03.300	00.	ast In Place Concrete - Full Package		Phase Total:	0.00
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Grid Info Co	st Types Notes	Roles			
Phase	Phase Desc	Description	Contract	Contract Desc	Contract Item
01.1272.	Temp Fire Protectio	Temp Fire Protection Extinguishers	1212.	La Vida Llena Rio R	1.00
01.1292.	Cellular Phones	Cellular Phones	1212.	La Vida Llena Rio R	1.00
01.1312.	Temp Fences - Con	Temp Fences - Construction	1212.	La Vida Llena Rio R	1.00
01.1328.	Dumpsters & Haul	Dumpsters & Haul off	1212.	La Vida Llena Rio R	1.00
01.1336.	Clean Up Labor/Go-	Clean Up Labor/Go-Fer	1212.	La Vida Llena Rio R	1.00
01.1404.	Final Cleaning Subc	Final Cleaning Subcontractor	1212.	La Vida Llena Rio R	1.00
01.1412.	Project ID Signs	Project ID Signs	1212.	La Vida Llena Rio R	1.00
01.1416.	Field Office Rental	Field Office Rental & Set Up	1212.	La Vida Llena Rio R	1.00
01.1420.	Field Storage Traile	Field Storage Trailer(s)	1212.	La Vida Llena Rio R	1.00
01.1428.	Office Supplies	Office Supplies	1212.	La Vida Llena Rio R	1.00
01.1432.	Office Equipment	Office Equipment	1212.	La Vida Llena Rio R	1.00
01.1436.	Computer Equipme	Computer Equipment	1212.	La Vida Llena Rio R	1.00
01.1448.	Temp HVAC/Heat	Temp HVAC/Heat	1212.	La Vida Llena Rio R	1.00
01.1452.	Weather Conditions	Weather Conditions	1212.	La Vida Llena Rio R	1.00
01.1468.	Project Record Doc	Project Record Documents & As Builts	1212.	La Vida Llena Rio R	1.00
01.1476.	Warranties	Warranties	1212.	La Vida Llena Rio R	1.00
01.1480.	Small Tools & Repa	Small Tools & Repairs	1212.	La Vida Llena Rio R	1.00
01.1482.	Reproductions/Print	Reproductions/Printing	1212.	La Vida Llena Rio R	1.00
01.1484.	Fed-X & Postage Co	Fed-X & Postage Costs	1212.	La Vida Llena Rio R	1.00
01.1494.	AGC Dues	AGC Dues	1212.	La Vida Llena Rio R	1.00
01.1496.	Payment & Perform	Payment & Performance Bonds	1212.	La Vida Llena Rio R	1,00
01.1504.	Buillders Risk Insur	Builders Risk Insurance	1212.	La Vida Llena Rio R	1.00
60.1000.	Project Manager - P	Project Manager - Precon	1212.	La Vida Llena Rio R	1.00
60,1008.	Assistant Project M	Assistant Project Manager - Precon	1212.	La Vida Llena Rio R	1.00
60,1040.	Senior Estimator -	Senior Estimator - Precon	1212.	La Vida Llena Rio R	1.00
60.1044.	Estimator - Precop	Estimator - Precon	1212.	La Vida Llena Rio R	1.00
/ 03 3000	Cast In Place Coper	Cast In Place Concrete - Full Package	1212	La Vida Llena Pio P	1.00
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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.

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00.0000	Cast In Place Concrete -1 dir Patkage			0.00
Grid Info Cost Types Not	Roles			
Phase Phase Desc		Contract	Contract Desc	Contract Item
01.1204. Testing	Testing	1212.	La Vida Llena Rio R	1.00
101 1238 Trucking & Hauling	Trucking & Hauling	1212	La Vida Llena Rio R	1.00
01.1240. Safety Program	Safety Program	1212.	La Vida Llena Rio R	1.00
01.1252. Temp Electrical Ser	Temp Electrical Service	1212.	La Vida Llena Rio R	1.00
01.1260. Temp Lighting	Temp Lighting	1212.	La Vida Llena Rio R	1.00
01.1266. Temp Water (Cons	Temp Water (Construction)	1212.	La Vida Llena Rio R	1.00
01.1272. Temp Fire Protection	Temp Fire Protection Extinguishers	1212.	La Vida Llena Rio R	1.00
01.1292. Cellular Phones	Cellular Phones	1212.	La Vida Llena Rio R	1.00
01.1312. Temp Fences - Cor	Temp Fences - Construction	1212.	La Vida Llena Rio R	1.00
01.1328. Dumpsters & Haul	Dumpsters & Haul off	1212.	La Vida Llena Rio R	1.00
01.1336. Clean Up Labor/Go	Clean Up Labor/Go-Fer	1212.	La Vida Llena Rio R	1.00
01.1404. Final Cleaning Subo	Final Cleaning Subcontractor	1212.	La Vida Llena Rio R	1.00
01.1412. Project ID Signs	Project ID Signs	1212.	La Vida Llena Rio R	1.00
01.1416. Field Office Rental	Field Office Rental & Set Up	1212.	La Vida Llena Rio R	1.00
01.1420. Field Storage Traile	Field Storage Trailer(s)	1212.	La Vida Llena Rio R	1.00
01.1428. Office Supplies	Office Supplies	1212.	La Vida Llena Rio R	1.00
01.1432. Office Equipment	Office Equipment	1212.	La Vida Llena Rio R	1.00
01.1436. Computer Equipme	Computer Equipment	1212.	La Vida Llena Rio R	1.00
01.1448. Temp HVAC/Heat	Temp HVAC/Heat	1212.	La Vida Llena Rio R	1.00
01.1452. Weather Condition:	Weather Conditions	1212.	La Vida Llena Rio R	1.00
01.1468. Project Record Doc	Project Record Documents & As Builts	1212.	La Vida Llena Rio R	1.00
01.1476. Warranties	Warranties	1212.	La Vida Llena Rio R	1.00
01.1480. Small Tools & Repa	Small Tools & Repairs	1212.	La Vida Llena Rio R	1.00
01.1482. Reproductions/Prin	Reproductions/Printing	1212.	La Vida Llena Rio R	1.00
01.1484. Fed-X & Postage C	Fed-X & Postage Costs	1212.	La Vida Llena Rio R	1.00
01.1494. AGC Dues	AGC Dues	1212.	La Vida Llena Rio R	1.00
01.1496. Payment & Perform	Payment & Performance Bonds	1212.	La Vida Llena Rio R	1.00
01.1504. Buillders Risk Insur	Buillders Risk Insurance	1212.	La Vida Llena Rio R	1.00
03.3000. Cast In Place Conce	<			



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 (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. Double-click the cost type you wish to assign.

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Phase: 03.3000.	Cast In Place Concr	ete - Full Package	Phase Total:	0.00			
Contract Item: 1.0	0 General Conditions						
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Grid Info Cost Types	Notes Roles						
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					5 Equipment		
					6 Other		
					7 Tax		
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	Initialize Cost Types	Subcontract Detail	Material Detail]			



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.

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Phase:	03.3000.	Cast I	n Place Concr	ete - Full Package		Phase Total:	0.00					
Contract Item:	1	00 Genera	al Conditions			ĺ						
Item UM:	LS	Item Units:	(0.000 Item Unit Price:	0.00000	Item Amount:	0.00					
Grid Info	Cost Type	Notes Role	es									
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		Initialize Cost	Types	Subcontract Deta	il Ma	terial Detail	J					

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

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Project: 1212	2. La Vida	a Llena Rio Ra	ancho]	Record Type:	O-Original	✓ I	nitialize					
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Non-Interfaced	Interfaced														
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03.3000.	4 9	5UB	1						0.00	1 - Regular		Cast In Place Concrete		0.000	LS
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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.

SortName		Туре	Active	Temp	Purchase Address	POCity	POState	POCountry	Payment Address	
INTERCON		D								
	SortName		SortName Type	SortName Type Active	SortName Type Active Temp	SortName Type Active Temp Purchase Address	SortName Type Active Temp Purchase Address POCity	SortName Type Active Temp Purchase Address POCity POState	SortName Type Active Temp Purchase Address POCity POState POCountry	SortName Type Active Temp Purchase Address POCity POState POCountry Payment Address

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		👁 AP Vendors - Active or Temp Lookup	\sim
Select One:		Select One:	
• AP Vendors - Active or Temp		AP Vendors - Active or Temp	
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Vendor Name	SortName	Vendor Name	SortName
groundskeeper		*groundskeeper	
		3107 ENVIROMENTAL EARTHSCAPES ODB THE GROUNDSKEEPER	GROUNDSKEE
<	>	<]	>
Setup	OK Cancel	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.





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

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Phase	Co.	st Type C-T Abbr	Sequence	el	Vendor	Vendor Name	Subconti	act Numb	her		SL Item	A	mount	SL Item Type	SL Add-On	SL Item Desc	Add-On %	Units	s UM
Ø 03.3000.		4 SUB	1		1348	INTERCON COMP	4						0.00	1 - Regular		Cast In Place Concrete		0.000	0 LS
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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.

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Ø 03	3000.	4	SUB		1	1	348 IN	ITERCON COMPA	1212-03.	3000-5			1	0.00	1 - Regula		Cast In Place Concrete		0.000	LS
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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.

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Subcontract			SL Descri	iption					Vendo	r Vendor Name	Approve	d Hold Code	Hold Code Desc	Pay Terms	Pay Terms Desc	Comp Group	Comp Group Desc	Total
1212-03.30)0-S		Cast In F	lace Conci	rete - Ful	ll Package			1348	B INTERCON COM	PA			35	Net 30 days	PRIV	Private Jobs	
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13. On this screen double-click the empty cell under the "Responsible Person" column. Hit the keyboard function key "F4"

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											4 Tim Dingman	
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											7 Sarah Elsbernd	
							14 Locate a	and double-c	lick vour		8 Easton Hamblin	
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									ne person		10 Carlie Humphreys	
								list.			11 Jim King	
											12 Dan Lyons	~





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

Image: Second state sta	
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	×
Select One:	
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 O All Active Firms	
8 Easton Hamblin Project Firms	
	Se
Intercon	
Intercon Company, LLC	IN
16. This will bring up a small window. Type in and locate the	
subcontractor or material contractor "Firm". Double-click your	
colortion Note: "Eine" and "Vender" are two different detelores in	
selection. Note: Firm and vendor are two different databases. In	>
our instance, your "Firm" will be the same company as your "vendor".	Cancel

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

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tacts - Active
Contacts
Name
OK Cancel

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

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



🗟 1 Create Document from Template

21. A new window will appear. Next to the words "Template:", use the drop down 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.

	Records	Options	Tools	Windows	Help	
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emplate:	BSC 10	04 Material	Contract		~	
Select Doc	ument Creat	ion Type —				
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д						
Al Save	Generated D	ocument				
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G G	Generated D	ocument cument:				Save As

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

emplate:	BSC 1314 Subco	intract		~	
Select Docum	ent Creation Type				
💿 Attach D	ocument to Paren				
Atta	chment Name:	BSC 13	14 Subcontra	ct.doc×	
🚫 Save Ge	nerated Document				
Gene	erated Document:				Save As

*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., for 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-slick "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



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Programs.

Reports

Project Management

Subcontract Ledger

Viewpoint Administration

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Reports

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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".

File Edit

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Batch Month: -Display

Records Options

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		tem:				Hrs/	ManDay:	UM:					
	F	hase:			Cost Type:		Min. Proj. %:		🔳 Buy Out				
	Units Hours Costs U/C U/HR	Curr Est + Ir	d CO's Actual + Cmt	d % Complete	Over / Under	Remaining	Final	Previous	Forecast				
	Se	et Remain UC	Calculate	Refresh Data	JC Cost Report		Fut	ure CO's	Costs				
	Enter the p	rojection date										Record 0 of 0 🔍 Gr	id Co#: 1

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



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.

File	Edit	Records	View Op	otions To	iols Win	idows Help													
🕑			125	2	• 🌒 ا	🚴 - 🎸	Gri	id 🕶 💽 (() () ()										
Month	: 0	l/14 Ba	tch #:	227	Date:	1/15/14	Job:	1207.	LVL Car	ter Hall									
Phas	se	Descript	ion	Cost T	ype (Co's CO's	Α	ctual Cost	Projected Cost	Current Es	t'd Act	ual Units	Projected Units	Original Est'd Hours	Actual Hours	Projected Hours	+ Actual Committed Units	Actual + Committed Cos	- Contra 🔼
01.1	.000.	Project	Manager	LAB		65,550.00	2	29,044.48	35,000.00	0.0	00	0.000	65,550.000	0.00	1,038.00	0.00	0.000	29,044.48	3 🗏
01.1	.000.	Project	Manager	BUR		36,054.00	1	15,974.35	19,250.00	0.0	00	0.000	0.000	0.00	0.00	0.00	0.000	15,974.35	5
01.1	.000.	Project	Manager	OTH		19,950.00		2,645.53	5,000.00	0.0	00	0.000	0.000	0.00	0.00	0.00	0.000	2,645.53	3
01.1	.012.	Project	Engineer	LAB		25,200.00		3,088.27	10,000.00	0.0	00	0.000	0.000	0.00	175.00	0.00	0.000	3,088.27	7
01.1	012.	Project	Engineer	BUR		13,860.00		1,698.52	5,500.00	0.0	00	0.000	0.000	0.00	0.00	0.00	0.000	1,698.52	2
01.1	.012.	Project	Engineer	OTH		0.00		18.69	1,000.00	0.0	00	0.000	0.000	0.00	0.00	0.00	0.000	18.69)
01.1	024.	Project	Technician	LAB		8,400.00		3,778.50	8,400.00	0.0	00	0.000	0.000	0.00	234.25	0.00	0.000	3,778.50)
01.1	024.	Project	Technician	BUR		4,620.00		2,078.37	4,620.00	0.0	00	0.000	0.000	0.00	0.00	0.00	0.000	2,078.37	7
01.1	.044.	Estimate	or	LAB		110.95		0.00	0.00	0.0	00	0.000	0.000	0.00	0.00	0.00	0.000	0.00)
01.1	044.	Estimate	or	BUR		61.02		0.00	0.00	0.0	00	0.000	0.000	0.00	0.00	0.00	0.000	0.00)
01.1	.046.	BIM Cod	rdination	LAB		0.00		72.10	1,000.00	0.0	00	0.000	0.000	0.00	3.00	0.00	0.000	72.10)
01.1	.046.	BIM Cod	rdination	BUR		0.00		39.66	620.00	0.0	00	0.000	0.000	0.00	0.00	0.00	0.000	39.66	j 🗌
01.1	.048.	Project	Superintende	en LAB		82,080.00	5	59,844.04	68,000.00	0.0	00	0.000	0.000	0.00	1,892.00	0.00	0.000	59,844.04	ł
01.1	.048.	Project	Superintende	en BUR		45,144.00	3	32,914.19	37,400.00	0.0	00	0.000	0.000	0.00	0.00	0.00	0.000	32,914.19)
01.1	.048.	Project	Superintende	en EQU		0.00		6,560.00	10,830.00	0.0	00	0.000	0.000	0.00	0.00	0.00	0.000	6,560.00)
01.1	.048.	Project	Superintende	en OTH		21,660.00		4,029.00	7,000.00	0.0	00	0.000	0.000	0.00	0.00	0.00	0.000	4,029.00)
01.1	116.	Blue Prir	nts & Specific	ta OTH		4,500.00		3,390.71	5,500.00	0.0	00	0.000	0.000	0.00	0.00	0.00	0.000	3,390.71	
01.1	156.	Building	Permit	OTH		0.040.00			10 000 00	0.0	00	0.000	0.000	0.00	0.00	0.00	0.000	17 012 24	2
01 1	168	Drecons	truction Con	for OTH		4,307,183.00	3,20	64,495.07	4,307,183.00					0.00	5,952.25	0.00		3,617,430.1.	
	Record	s: 213		To	tals:														
Grid	Info	Notes	Projection	n Detail															
Phase		Cost Type UM	Minimum Projection	Buy Out Over	/Under Co:	st Remaining	g Cost	Final Co	ost Uncomm	itted Cost	CurrEstUnits	Actual U	Ints Complete Ur	ent Over/Unde nits Unit	Remaining Units	Final Units	Previous Units F	orecast Units Cu	rrEstH
00.102	4.	1 LS	10.00 %		0.0	10 -	25.50	0.	00	0.00	0.000	0.0	000 0.0000	0.00	0.000	0.000	0.000	0.000	C
00.102	4.	2 LS	10.00 %		0.0	10 -	14.03	0.	00	0.00	0.000	0.0	000 0.0000	0.00	0.000	0.000	0.000	0.000	C
01.100	0.	1 LS	10.00 %		-30,550.0	0 5,9	55.52	35,000.	.00	0.00	0.000	0.0	000 0.0000	65,550.00	65,550.000	65,550.000	65,550.000	0.000	C
01.100	0.	2 LS	10.00 %		-16,804.0	0 3,2	75.65	19,250.	.00	0.00	0.000	0.0	000 0.0000	0.00	0.000	0.000	0.000	0.000	C
01.100	0.	6 LS	10.00 %		-14,950.0	0 2,3	54.47	5,000	.00	0.00	0.000	0.0	000 0.0000	0.00	0.000	0.000	0.000	0.000	C
01.101	2.	1 LS	10.00 %		-15,200.0	0 6,9	11.73	10,000.	.00	0.00	0.000	0.0	000 0.0000	0.00	0.000	0.000	0.000	0.000	(
01.101	2.	2 LS	10.00 %		-8,360.0	0 3,8	01.48	5,500.	.00	0.00	0.000	0.0	000 0.0000	0.00	0.000	0.000	0.000	0.000	C
01.101	2.	6 LS	10.00 %		1,000.0	0 9	81.31	1,000	.00	0.00	0.000	0.0	000 0.0000	00.0	0.000	0.000	0.000	0.000	
01,102	4.	115	10.00 %		. 0.0	n 4.6	21.50	8,400.	.00	0.00	0.000	0.0	anal a.aaaa	nna n.na	n	0.000	0.000	0.000	
<																			>
	Set Rem	nain UC	Calc	ulate	Refi	resh Data		JC Cost Repo	ıt		F	uture CO's	Cos	sts					



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 Record	ls V	'iew Optior	ns Tools	Windo	ws Help														
🕑	> 🌍 📄	H.	XOá	2	∑ - ⊘	> - 🚱	Gr	id 🕶 💽 (000	1										
Month	: 01/14	Batch	h#:	227 D	ate;	1/15/14 🕎	Job:	1207.	LVL Ca	rter Hall										
Phas	e Des	cription	n	Cost Type	Cui	rr Est + Incl CO's	A	ctual Cost	Projected Cost	Current	Est'd Ac Units Ac	tual Units	Projected L	Units	Original Est'd Hours	Actual Hours	Projected Hours	+ Actual Committed Units	Actual Committed Co:	+ Contra 🔥
01.1	000. Proj	ject Ma	anager	LAB		65,550.00	í	29,044.48	35,000.00	0	.000	0.000	65,550.	.000	0.00	1,038.00	0.00	0.000	29,044.4	8 ≣
01.1	000. Proj	ject Ma	anager	BUR		36,054.00		15,974.35	19,250.00	0	.000	0.000	0.	.000	0.00	0.00	0.00	0.000	15,974.3	5
01.1	000. Proj	ject Ma	anager	OTH		19,950.00		2,645.53	5,000.00	0	.000	0.000	0.	.000	0.00	0.00	0.00	0.000	2,645.5	3
01.1	012. Proj	ject En	gineer	LAB		25,200.00		3,088.27	10,000.00	0	.000	0.000	0.	.000	0.00	175.00	0.00	0.000	3,088.2	7
01.1	012. Proj	ject En	gineer	BUR		13,860.00		1,698.52	5,500.00	0	.000	0.000	0.	.000	0.00	0.00	0.00	0.000	1,698.5	2
01.1	012. Proj	ject En	gineer	OTH		0.00		18.69	1,000.00	0	.000	0.000	0.	.000	0.00	0.00	0.00	0.000	18.6	9
01.1	024. Proj	ject Te	chnician	LAB		8,400.00		3,778.50	8,400.00	0	.000	0.000	0.	.000	0.00	234.25	0.00	0.000	3,778.5	0
01.1	024. Proj	ject Te	chnician	BUR		4,620.00		2,078.37	4,620.00	0	.000	0.000	0.	.000	0.00	0.00	0.00	0.000	2,078.3	7
01.1	044. Esti	mator		LAB		110.95		0.00	0.00	0	.000	0.000	0.	.000	0.00	0.00	0.00	0.000	0.0	0
01.1	044. Esti	mator		BUR		61.02		0.00	0.00	0	.000	0.000	0.	.000	0.00	0.00	0.00	0.000	0.0	0
01.1	046. BIM	Coord	lination	LAB		0.00		72.10	1,000.00	0	.000	0.000	0.	.000	0.00	3.00	0.00	0.000	72.1	0
01.1	046. BIM	Coord	lination	BUR		0.00		39.66	620.00	0	.000	0.000	0.	.000	0.00	0.00	0.00	0.000	39.6	6
01.1	048. Proj	ject Suj	perintenden	LAB		82,080.00	Ę	59,844.04	68,000.00	0	.000	0.000	0.	.000	0.00	1,892.00	0.00	0.000	59,844.0	4
01.1	048. Proj	ject Suj	perintenden	BUR		45,144.00	:	32,914.19	37,400.00	0	.000	0.000	0.	.000	0.00	0.00	0.00	0.000	32,914.1	9
01.1	048. Proj	ject Suj	perintenden	EQU		0.00		6,560.00	10,830.00	0	.000	0.000	0.	.000	0.00	0.00	0.00	0.000	6,560.0	0
01.1	048. Proj	ject Suj	perintenden	OTH		21,660.00		4,029.00	7,000.00	0	.000	0.000	0.	.000	0.00	0.00	0.00	0.000	4,029.0	0
01.1	116. Blue	e 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	3,390.7	1
01.1	156. Buile	ding Pe	ermit	OTH		0.040.00		7 014 24	10.000.00	0	000	0.000	0	000	0.00	0.00	0.00	0.000	17 014 2	<u> </u>
01 1	168 Drei	conctri.	uction Confer	ОТН	4,	307,183.00	3,2	64,495.07	4,307,183.00						0.00	5,952.25	0.00		3,617,430.1	7
	Records: 213			Totals	: <								1							>
Grid	Info N	lotes	Projection De	etail																
Phase	Cost Type	UM P	Minimum Buy Projection Out	t Over/Ur	nder Cost	Remaining	Cost	Final C	ost Uncomm	nitted Cost	CurrEstUnits	Actual L	Unts Compl	Percent lete Units	Over/Under Units	Remaining Units	Final Units	Previous Units	Forecast Units Cu	ırrEstH(
00.102	4. 1	LS	10.00 %		0.00	-2	5.50	0	.00	0.00	0.000	0.	.000 0	0.000000	0.000	0.000	0.000	0.000	0.000	C
00.102	4. 21	LS	10.00 %		0.00	-1	4.03	0	.00	0.00	0.000	0.	.000 0	0.000000	0.000	0.000	0.000	0.000	0.000	(
01.100	0. 1	LS	10.00 %	-3	0,550.00	5,95	5.52	35,000	.00	0.00	0.000	0.	.000 0	0.000000	65,550.000	65,550.000	65,550.000	65,550.000	0.000	(
01.100	0. 21	LS	10.00 %	-1	6,804.00	3,27	5.65	19,250	.00	0.00	0.000	0.	.000 0	0.000000	0.000	0.000	0.000	0.000	0.000	(
01.100	0. 61	LS	10.00 %	-1	4,950.00	2,35	4.47	5,000	.00	0.00	0.000	0,	.000 0	0.000000	0.000	0.000	0.000	0.000	0.000	(
01.101	2. 1	LS	10.00 %	-1	5,200.00	6,91	1.73	10,000	.00	0.00	0.000	0,	.000 0	0.000000	0.000	0.000	0.000	0.000	0.000	C
01.101	2. 2	LS	10.00 %	-	8,360.00	3.80	1.48	5,500	.00	0.00	0,000	0.	.000 0	0.000000	0.000	0,000	0,000	0.000	0.000	-
01.101	2, 6	IS	10.00 %		1,000.00	98	1.31	1,000	.00	0.00	0,000	0.	.000 0	0.000000	0.000	0,000	0,000	0,000	0.000	
01.102	4. 1	S	10.00 %		0.00	4.62	1.50	8,400	.00	0.00	0.000	0.	.000 0	0.000000	0.000	0.000	0.000	0.000	0.000	
<																				>
	Set Remain UC		Calcula	te	Refres	sh Data		JC Cost Repo	vit			Future CO's		Costs						

Cost Projections



 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.

File	Edit	Records View Op	tions Tools	Windows Help		
	Select B	atch		189		
	Process	Batch				
3	Refresh	5	227 Date	1/15/14		
0	Close		Cost Type	Curr Est + Ind		
	Defrach	Deba:	LAB	0.00		
	reenresn	Data	BUR	0.00		
	Projectio	on Options	LAB			
	and the state	- Record and a second	BUR	36,054.00		
	Calculat	e Projections	OTH	19,950.00		
	Projectik	on Detail Insert	LAB	25,200.00		
	-		BUR	13,860.00		
	Job Clos	leout	OTH	0.0		
	Job Pha	se Roles Initialize	LAB	8,400.00		
UI.	1024.	Project rechnician	BUR	4,620.00		
01.	1044.	Estimator	LAB	110.95		
01.	1044.	Estimator	BUR.	61.02		

	Records	Options	Tools	Windows	Help	
00						
oth	01/14	Batch#1		227		
nfo	01/11	Datch#1	2	443		
Ireated by:	ehamblir	n				
Ireated:	1/15/20	14 5:03:00	PM			
Source:	JC Projo	:tn			_	
itatus:	Validate	d			V.	alidate
Batch L	ist ull Projectior punt Distribu	n Detail tion			P	review
Batch L Show F GL Acco Invento	ist ull Projectior bunt Distribu ory Distributi st	n Detail tion on			P	review Print
Batch L Show F GL Acco Invento Error Li	ist u ll Projectior ount Distribu ory Distributi	n Detail tion on			P	review Print
Batch L Show F GL Acco Invento Error Li-	ist ull Projection bunt Distribu bry Distributi st	n Detail tion on			P	review Print
Batch L Show F GL Acco GL Acco Frror Li	ist ull Projection ount Distribut ory Distributi st	Detail tion on				Print
Batch L Show F GL Acco GL Acco Invento Error Li	ist ull Projection bunt Distribut ory Distributi st n Reports to	n Detail tion on HQ Batch C	ontrol:	Yes		Print
Batch L Show F GL Acco GL Acco Invento Error Li	ist ull Projection bunt Distribut bry Distributi st n Reports to	n Detail tion on HQ Batch C 1/15/	ontrol: 14 🕎	Yes		Print

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.

Ø	
JC Contract Stat	us Report
Inputs Report Info Notes	
Company:	1
Beginning Contract:	
Ending Contract:	
Through Month:	02/14 🚔
(O)pen, (C)losed or (A)ll Jobs:	0
If Closed Jobs Only:	
Beginning Closed Month:	
Ending Closed Month:	
	ili an

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

🤝 All Co	ontracts Lookup 🛛 🔀	3
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 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	

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

🦘 All Co	ontracts Lookup	\overline{X}
Contract	Description	
1207		
1207.	La Vida Llena Carter Hall & Commons Building Remodel	Pro
<	1111	>
	OK Capcal	1
		J

7. From this screen, single-click "print". Select which printer you wish to print to. Note: If you would like the most upto-date data, make sure you select the current month in the cell right of "Through Month:".

	JC Contract Status	Report
Inputs	Report Info Notes	
Com	pany:	1
Begir	nning Contract:	1207.
Endir	ng Contract:	1207.
Thro	ugh Month:	02/14 🔿
(0)p	en, (C)losed or (A)ll Jobs:	0
IF Cl	osed Jobs Only: Beginning Closed Month:	
	Ending Closed Month:	-

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

File	Folders	Items	View	Options	Link	s Window	s Help	D						
9	al-	😒 👘			0	<u>ах</u> (î -	R	_				
Bra ()	Bradbury Stamm Stamm UNM 1650 LVL Carter Dillon													
Menu	1enu UNM 1650 UVL Carter Dillon													
Compa	Company: 1 - BRADBURY STAMM CONSTRUCTION INC													
		BRADBURN	/ STAM		. 1						۶			
		My Tasks				Title 🔺 🗟 JC Con	tract Ma	aster -	- Summar	γ				
Đ		Accounts I	Payable			📑 JC Con	tract Ma tract Ph	aster 9 nase C	Start Mor Sost Type	nth Excepti :s	on			
Đ		Accounts I	Receivał	ole		🔒 JC Con	tract Pro	ofit	(Itom D	otaile				
÷		Cash Mana	gement			JC Con	tract Pro	ofit w	ith Chang	ge Orders				
Đ		Document	Manage	ement	≡	📑 JC Con 🗟 JC Con	tract Pu tract St	atus F	rror List Report					
Đ		General Le	edger			C Cost	: and Re : and Re	evenu evenu	e e By Iten	n				
Đ		Headquart	ers			JC Cost	: by Job : By Job) and (), Phas	Cost Typ se and Co	e ost Type				
Đ		Imports				JC Cost	: Header : Report	r Deta t	ail					
÷		Job Billing				Cost	: Report : Report	t By C t With	ontract I n ACO	tem				
		Job Cost				JC Cost	to Esti	mates Drillda	s Compari	ison				
		🧻 Proç	grams			JC Cost	: Type F : Type F	Phase:	s Report					
		Ren	orts			🔜 JC Cost	: rypes :s By Co	Intract	t Item					
						👼 JC Cost	s/Estim	ates b	oy Projec	t Manager				
±		Payroll			~	📑 JC Cost	s/Estim	ates F Ictivity	Report / Poport					
<				>			- Produ		, keport					





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 - La	auncher 📃 🗖 🔀
File Help	
<i>®</i>	
	JC Cost Report
Inputs Report Info Notes	
Company:	1
Beginning Job:	
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 Prin	nt Export Cancel
	Co#: 1

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

🖘 All Jo	bs Lookup	X
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	

14. From this screen, single-click "print". Select which printer you wish to print to. Note: If you would like the most upto-date data, make sure you select the current month in the cell right of "Through Month:".

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

Job Description 1207 1207. LVL Carter Hall	
1207 1207. LVL Carter Hall	
1207. LVL Carter Hall	
<	>

492	: JC Cost Report - Launcher	
File	Help	
5		
	JC Cost Report	
Inputs	Report Info Notes	
Com	pany:	1
Begir	nning Job:	1207.
Endir	ng Job:	1207.
Thro	ugh Month:	02/14 🚔
Page	by Job?:	
(O)p	en, Open /(S)oft Closed, (C)lose or (A)ll Jobs?:	0
If Clo	osed Jobs Only: Beginning Closed Month:	
	Ending Closed Month:	
	Preview Print Export	Cancel
		T

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





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

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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.

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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.

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

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9. This will auto-fill the previously blank item cells under columns "Contract Desc", "Customer", "Name", "Application #", "Invoice Description", and "Invoice Status". Now locate and single-click "Items" from the upper tabs.

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10. This will bring up the contract items you created in the "Owner/BSC contract input" section. The only cell(s) you need to input on this window is located under "This Bill WC Amount". Input the approved bill amount (do not input an amount until you know it is the approved amount that BSC will be paid). Note: For advanced users, a bill amount for each schedule of values item can be input here item by item. Most users will just have one contract item and one bill amount per month per job.

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	2.00	Dillion Hall - Health Services	LS	272,632.50	181,314.01	66.50 %	0.00	181,314.01	0.00 %	0.00			
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11. Once you have filled in the billing amount(s), now locate and single-click "Info" from the upper tabs.

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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.



End of Section

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

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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.

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5. Single-click the "Refresh" button

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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.

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

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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.

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

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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.

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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.

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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.

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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.

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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.

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

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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.

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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.

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

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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.

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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

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

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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.

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

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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.

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

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

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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.

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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 signed change order to your ACO. Now interface the ACO via the "PM Interface" program.

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End of Section

Subcontractor Change Orders



1. Locate and double-click 2. Locate and single-click 3. Locate and double-click "PM Subcontract Change Orders" "Project Management" "Programs" from the folder from the item list from folder panel panel Folders Options Help Folders Options Links File ltems View Links Windows File View. File Folders Options Link View al - 🎲 1-2 al - 🌮 al - 🕄 0 Bradbury Bradbury Bradbury BRADBURY STAMM BRADBURY STAMN BRADBURY STAM 🚺 Stamm 🚺 Stamm 🚺 Stamm CONSTRUCTION INC CONSTRUCTION IN CONSTRUCTION IN Menu Menu UNM 1650 LVL Carter Dillon Menu UNM 1650 LVL Carter Dillon UNM 1650 LVL Carter Dillon Company: 1 - BRADBURY STAMM CONSTRUCTION INC + Company: 1 - BRADBURY STAMM CONSTRUCTION Company: 1 - BRADBURY STAMM CONSTRUCTIO Q ^ ~ \wedge Cash Management General Ledger Search Đ + Title . . BRADBURY STAMM CONSTRU Document Management Headquarters Đ + PM Notes My Tasks General Ledger Ð + Imports PM Notes Review PM Notes Review Management Headquarters Accounts Payable \blacksquare Job Billing ÷ ÷ PM Other Documents FIN Pending Change Orders Imports Accounts Receivable Đ Job Cost ÷ PM Phase Cost Type Settings S PM Project Budgets Cash Management Ð Job Billina Pavroll (H Ð 🔁 PM Project Firms Job Cost S PM Project Locations Document Management Ξ Project Management Ŧ 🔚 PM Project Phases Đ Payroll General Ledger Ð Programs PM Projects PM Punch Lists Ξ Project Management Headquarters Reports (H PM Request For Information PM Request For Quote - 6.6 Programs. Imports (H ÷ Reports Reports PM Subcontract Detail Job Billing Ŧ (H Subcontract Ledger PM Subcontracts Reports Đ Job Cost Đ + Viewpoint Administration PM Submittal Package PM Submittal Register Subcontract Ledger Ð Ð Payroll Workflow ÷ PM Submittals - 6.5 PM Test Loas Viewpoint Administration Đ Project Management \mathbf{E} V v PM Transmittals < < > < >





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

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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.

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

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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.

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

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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).

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Subcontractor 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).

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

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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.

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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.

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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.

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Subcontractor Change Orders



15. Single-click the "Distribution" tab.

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

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can create one. By single-clicking the "setup" button.





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

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

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



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

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Subcontractor Change Orders



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-slick "Yes". This will attach this word file to the subcontract change order you just created.

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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.