

# Module 1: Create a project, job, and contract

## \*NOTE

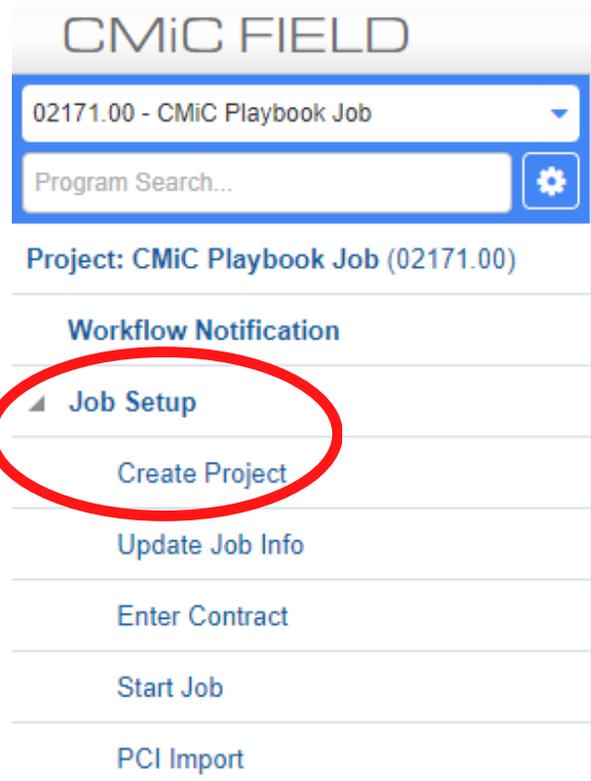
- Before you begin in CMiC, you will need to email **Christina Clyde** ([CClyde@LeeKennedy.com](mailto:CClyde@LeeKennedy.com)) to set up a client. You will need:
  - Company Name
  - Company Address
  - Company Telephone Number
  - Contact Name
  
- To setup a vendor in CMiC, you will need to email **Christina Clyde** with the following information:
  - Company Name (\*NOTE-DBA name may be different. See example below)
  - Company Remit-To Address
    - This may not be the same as on the W-9.
      - This is where the payment will be mailed
  - Company Telephone
  - Contact Name

Form <b>W-9</b> (Rev. October 2018) Department of the Treasury Internal Revenue Service	<b>Request for Taxpayer                  Identification Number and Certification</b> Go to <a href="http://www.irs.gov/FormW9">www.irs.gov/FormW9</a> for instructions and the latest information.	Give Form to the requester. Do not send to the IRS.
1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. <b>Next Step Concepts, Inc.</b>		
2 Business name/disregarded entity name, if different from above <b>DBA iLuminate Products</b>		
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.  <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) <input type="checkbox"/> _____ <input type="checkbox"/> Other (see instructions) <input type="checkbox"/> _____	<input type="checkbox"/> C Corporation <input checked="" type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
5 Address (number, street, and apt. or suite no.) See instructions. 700 Greendale Ave. Unit TH1002		Requester's name and address (optional)
6 City, state, and ZIP code Needham, MA 02492		
7 List account number(s) here (optional)		
<b>Part I Taxpayer Identification Number (TIN)</b> Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I later. For other		
		Social security number _____

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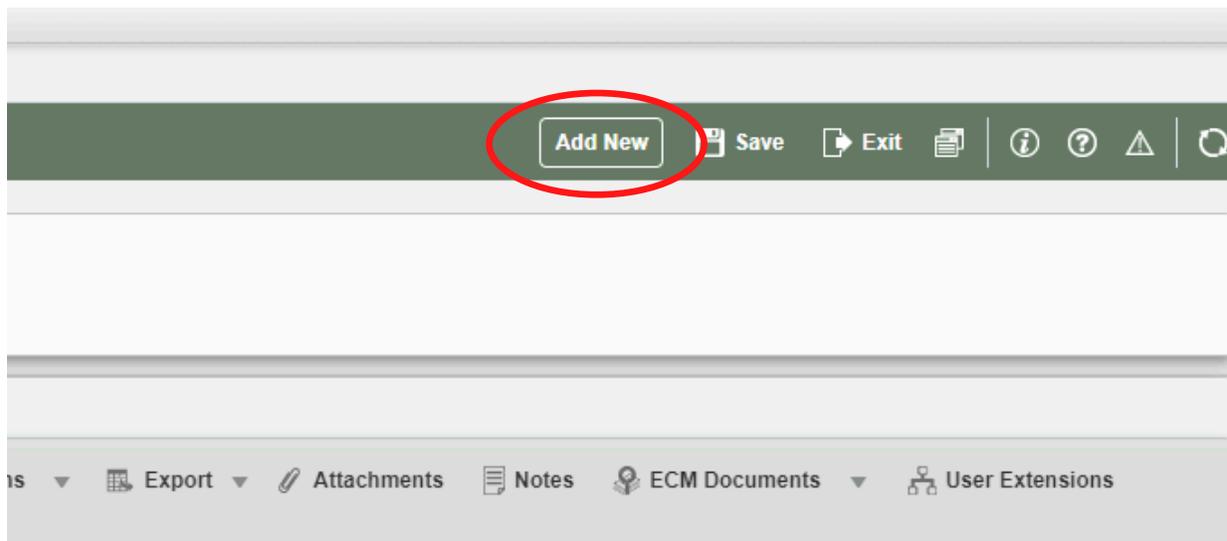
## 1 - Create a Project

- After logging into CMiC, click on the **blue Field** button
- Click on "Job Setup"
- Click on "Create Project"



## 2 - Create Project

- Click on "Add New"



# Module 1: Create a project, job, and contract

## 3 - Create a Project

- Type the project number generated from Protrac
  - Use the People and Culture website to access the [Protrac Playbook](#)
- Give the project a "Project Name"

The screenshot shows the 'Project Info' form. At the top, there is a toolbar with buttons for Search, Insert, Delete, Previous, Next, Duplicate Record, Workflows, and Report Options. Below the toolbar, there are two input fields: '\* Project' and '\* Project Name', both of which are circled in red. To the right of these fields is a 'Close Project' button. Below the input fields, there are two dropdown menus: 'Project Ctrl' (set to 'ALL') and 'Parent Project Name' (set to 'ALL'). At the bottom, there are tabs for 'General', 'Addresses', 'Key Players', 'Job Info', 'Classifiers', 'Defaults', 'Security', 'Notes', and 'Documents'. The 'General' tab is currently selected, showing fields for '\* Customer' and '\* Owner'.

## 4 - Create a Project

- Complete mandatory fields (\*) under the General tab
- Click on the Address tab and input the address of where the project is located

This screenshot shows the 'Project Info' form with the 'General' tab selected. The 'Project Name' field is circled in red. Other fields visible include '\* Customer', '\* Owner', '\* Start Date', 'End Date', '\* Description', '\* Contract Type', and 'Project Photo URL'.

This screenshot shows the 'Project Info' form with the 'Addresses' tab selected. The 'Address Code' field is circled in red. Other fields visible include 'Contact Name', 'Street', 'Suite', 'City', 'State/Province', 'Zip/Postal Code', 'Country', 'Phone', and 'Fax'.



# Module 1: Create a project, job, and contract

## 5 - Create a Project

- Click on the Job Info tab
- Scroll down to Job Setup and review populated fields

Project Ctrl ALL Parent Project Name ALL

General Addresses Key Players **Job Info** Classifiers Defaults Security Notes Documents

Bid Job Setup

\* Department

Job Setup

Billing Method Job Billing

JB Bill Type COST Cost Plus Markup

Invoice Format 3 Group 3 Detail

JB Map Code DFLT Default Mapping

Job

\* Job Department

## 6 - Create a Project

- Click the magnifying glass to select the
  - Department
  - Job Department
- **\*NOTE: Default Department should be "00 - Company Level"**
- Click "Save" when complete

Bid Job Setup

\* Department 00 Company Level

Job Setup

Billing Method Job Billing

JB Bill Type PC % Complete of Budgeted Cost

Invoice Format LS DO NOT USE

JB Map Code DFLT Default Mapping

Job

Job Department 00 Company Level

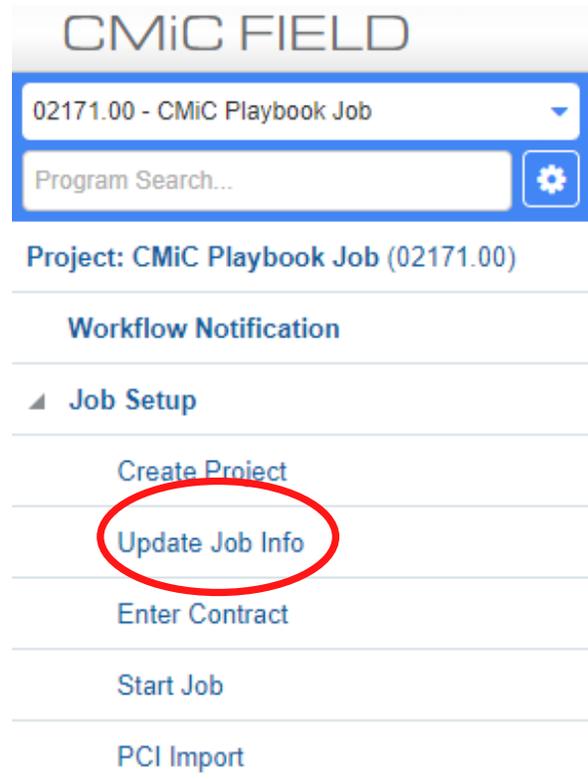
Save Exit



# Module 1: Create a project, job, and contract

## 7 - Update Job Info

- Click on "Job Setup"
- Click on "Update Job Info"



CMiC FIELD

02171.00 - CMiC Playbook Job

Program Search... 

Project: CMiC Playbook Job (02171.00)

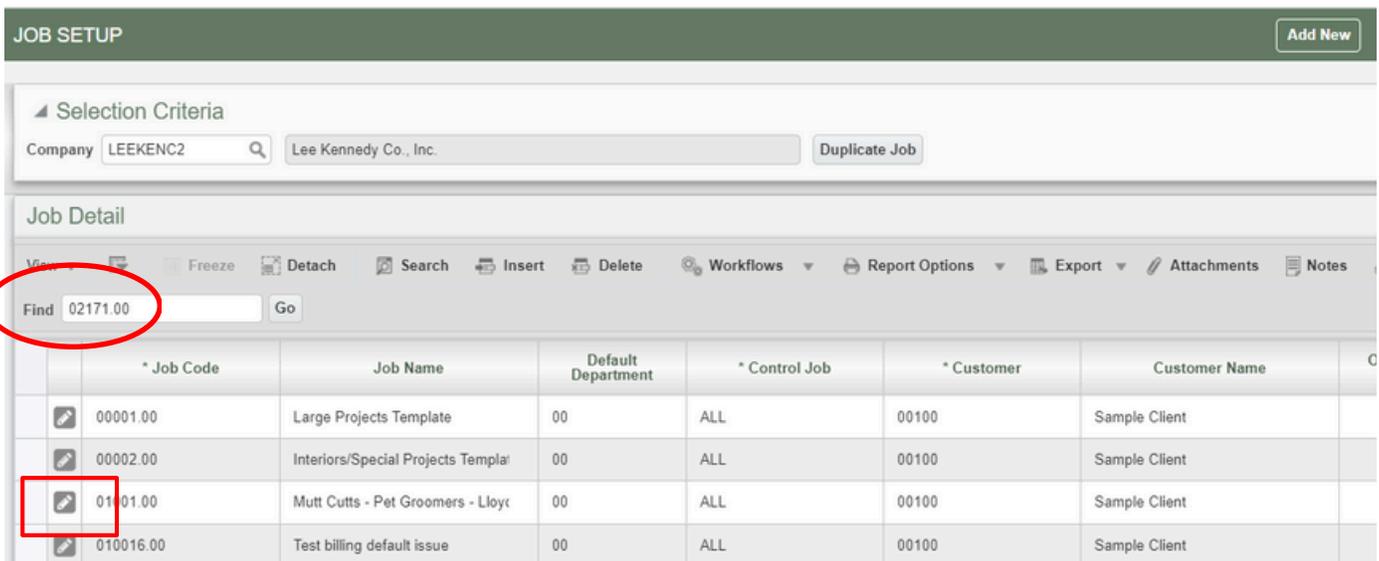
Workflow Notification

Job Setup

- Create Project
- Update Job Info**
- Enter Contract
- Start Job
- PCI Import

## 8 - Update Job Info

- Search for the job number and click "Go"
- Click on the pencil to edit



JOB SETUP Add New

Selection Criteria

Company   Duplicate Job

Job Detail

View  Freeze  Detach  Search  Insert  Delete  Workflows  Report Options  Export  Attachments  Notes

Find  Go

* Job Code	Job Name	Default Department	* Control Job	* Customer	Customer Name
 00001.00	Large Projects Template	00	ALL	00100	Sample Client
 00002.00	Interiors/Special Projects Templa	00	ALL	00100	Sample Client
 01001.00	Mutt Cutts - Pet Groomers - Lloy	00	ALL	00100	Sample Client
 010016.00	Test billing default issue	00	ALL	00100	Sample Client



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## 9 - Update Job Info

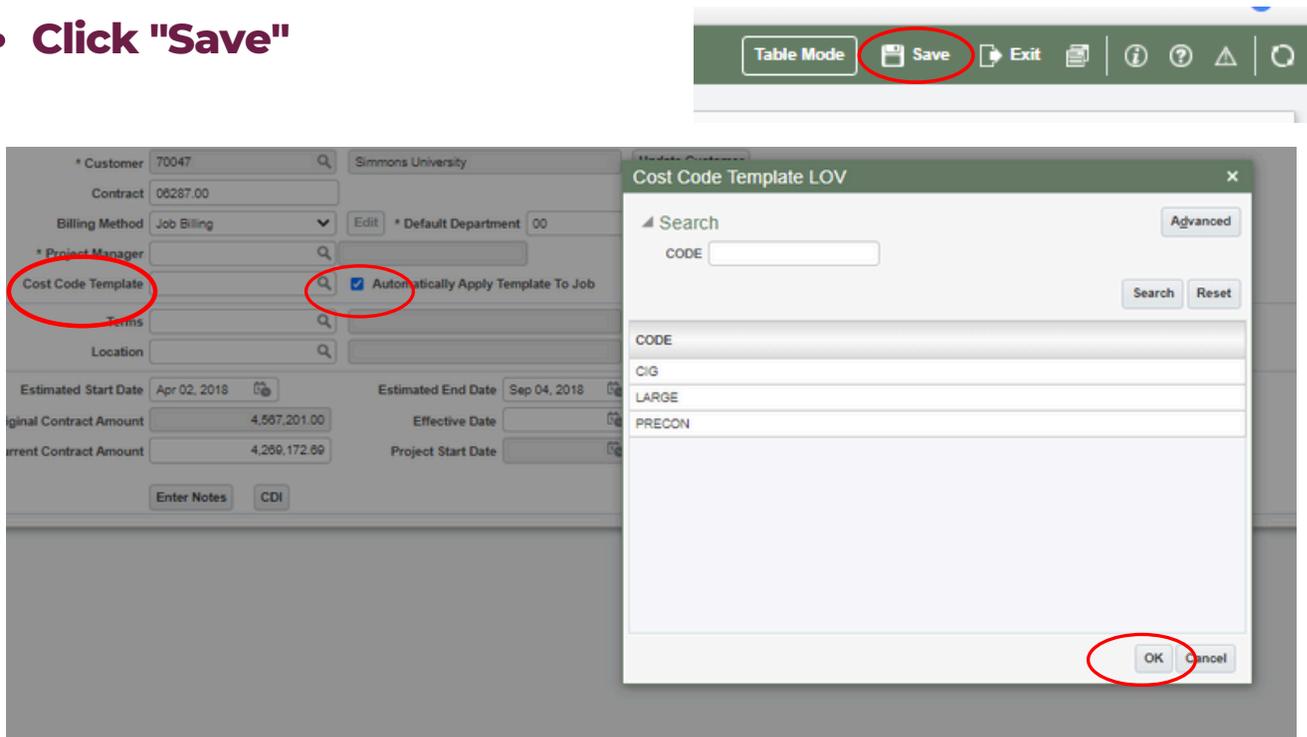
- **Confirm the required fields (\*) under "Job Detail" are correct**
- **Use the magnifying glass next to "Project Manager" to search for the PM**

The screenshot displays the 'JOB SETUP' application interface. At the top, there is a header bar with 'JOB SETUP' on the left and 'Table Mode', 'Save', and 'Exit' on the right. Below the header is the 'Selection Criteria' section, which includes a 'Company' field with the value 'LEEKENC2' and a search icon, and a text field containing 'Lee Kennedy Co., Inc.' with a 'Duplicate Job' button. The main section is titled 'Job Detail' and contains several tabs: 'Job Detail', 'Settings', 'Accounts', 'AP Taxes', 'Job Billing', 'WIP', 'Payroll', 'Bank', 'Security', 'Equipment Locations', 'Compliance', 'PO / WO', and 'WBS'. Below the tabs is a navigation bar with icons for 'Search', 'Insert', 'Delete', 'Previous', 'Next', 'Workflows', 'Report Options', 'Attachments', 'Notes', 'ECM Documents', and 'User Extensions'. The 'Job Detail' section contains several fields: '\* Job Code' (02171.00), 'CMIC Playbook Job', '\* Control Job' (ALL), 'Status' (Pending), '\* Customer' (00100), 'Sample Client', 'Update Customer' button, 'Contract' (02171.00), 'Billing Method' (Job Billing), 'Edit', '\* Default Department' (00), '\* Project Manager' (with a magnifying glass icon circled in red), and 'Cost Code Template' (with a search icon). There is also a checkbox for 'Automatically Apply Template To Job'.



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- Click on the magnifying glass next to "Cost Code Template"
  - Choose option based on your department
- Click "OK"
  - **\*NOTE-** This template should be used when you are opening a new job and don't have a budget yet. This will allow you to begin charging with the codes from the template
- Click on "Automatically Apply Template to Job"
- Click "Save"



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## 10 - Update Job Info

Job Detail

Job Detail Settings Accounts AP Taxes **Job Billing** WIP Payroll Bank Security Equipment

Search Insert Delete Previous Next Workflows Report Options Attach

* Default Billing Type	PC	% Complete of Budgeted Cost
* Default Invoice Format	LS	DO NOT USE
Billing Rate Table	DFLT	Default Billing Rate Table
JB Map Code	DFLT	Default Mapping
* Retainage Code	10	10% Retainage Rule - Below 3 Million

Table Mode Save Exit

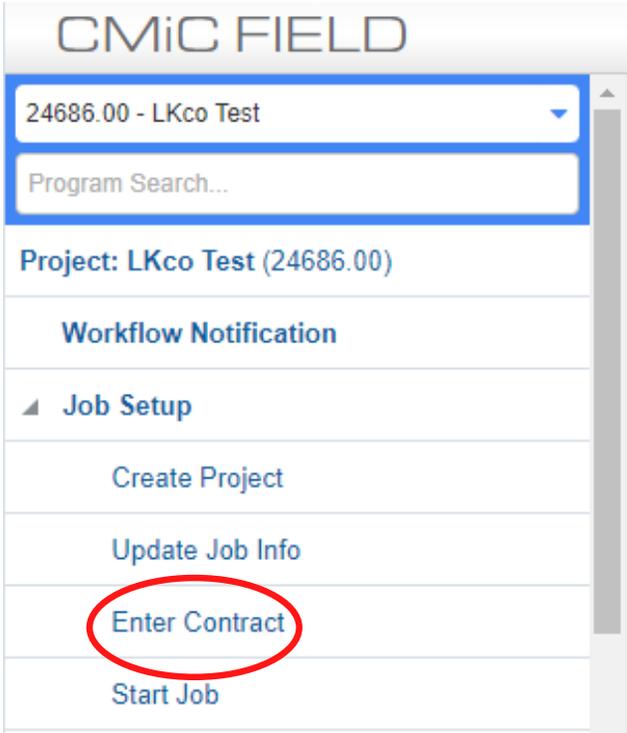
- Click on the "Job Billing" tab
- Confirm:
  - "Default Billing Type"
    - \*Note: Select "PC" if the contract is lump sum and "COST" if the contract type is cost-plus or GMP
  - Default Invoice Format
  - "Billing Rate Table"- Set to "DFLT"
  - "JB Map Code"- Set to "DFLT"
  - "Retainage Code"
- Click "Save" in the top right corner



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## 11 - Create Contract

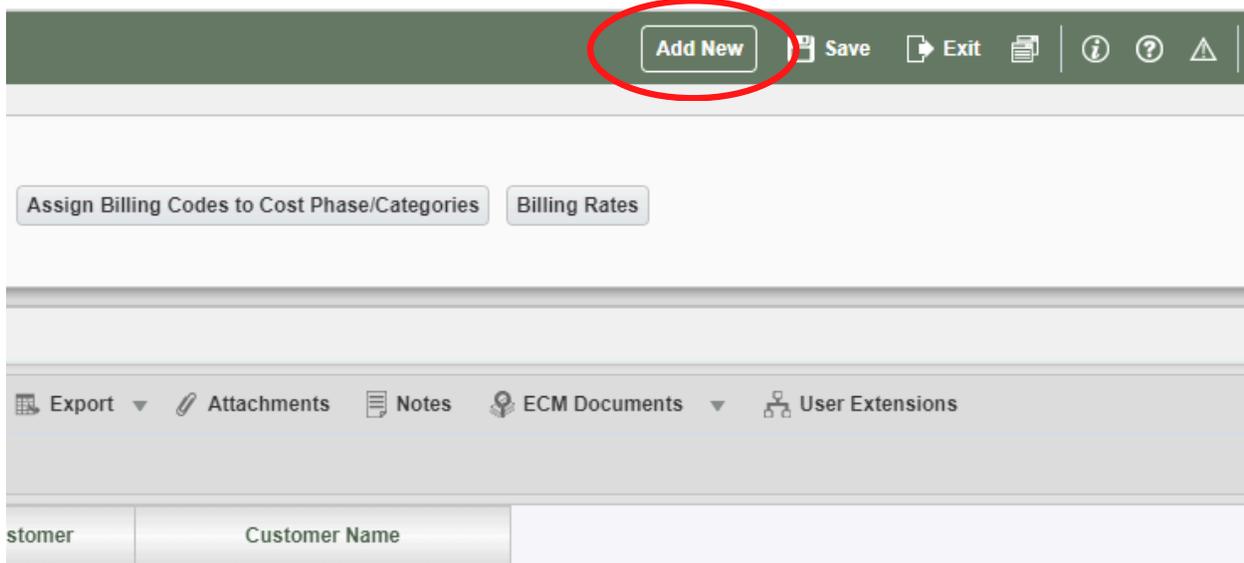
- Click on "Job Setup"
- Click on "Enter Contract"



The screenshot shows the CMiC FIELD software interface. At the top, there is a header "CMiC FIELD". Below it, a dropdown menu is open, showing "24686.00 - LKco Test" selected. Below the dropdown is a search bar labeled "Program Search...". Underneath, the text "Project: LKco Test (24686.00)" is displayed. A "Workflow Notification" section is visible. The "Job Setup" menu is expanded, showing several options: "Create Project", "Update Job Info", "Enter Contract" (which is circled in red), and "Start Job".

## 12 - Create Contract

- Click on "Add New"



The screenshot shows the CMiC FIELD software interface. At the top, there is a dark green header bar with several buttons: "Add New" (circled in red), "Save", "Exit", and three icons (info, help, warning). Below the header bar, there are two buttons: "Assign Billing Codes to Cost Phase/Categories" and "Billing Rates". At the bottom, there is a table with a header row containing "Customer Name" and a data row containing "stomer".



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## 13 - Create Contract

- Enter job number and press enter
  - Fields will autofill
- Review the "Contract Date"
- Click "Save"

**\*NOTE-** If you are not ready to upload your budget, but will need to make manpower projections, refer to [Page 20 \(Adding Custom Phase Codes\)](#)

The screenshot shows the 'CONTRACT ENTRY' form. At the top right, there are buttons for 'Table Mode', 'Save', and 'Exit'. The 'Save' button is circled in red. Below the header, there are tabs for 'Billing Items', 'Defaults', 'Rounding Methods', 'Address', 'Description', 'Officials', 'Surcharges', 'Risk Management', 'Separate Billing Information', and 'Mapping Groups'. The 'Billing Items' tab is active, showing a table with columns for Job, Contract, Customer, and Contract Date. The Job number '02171.0' and the Contract Date 'Feb 02, 2023' are circled in red. There are also search and filter icons for each column.

## 14 - Create Contract

- Click on the "Defaults" tab to confirm the retainage

The screenshot shows the 'Contract Information' form. The 'Defaults' tab is circled in red. Below the tabs, there is a 'Retainage Code' field with the value '10' circled in red. To the right of the field is a dropdown menu showing '10% Retainage Rule - Below 3 Million'. Below the field, there are three checkboxes: 'Warn If There Are Categories Without Bill Codes' (checked), 'Calculate And Release Retainage At Invoice Level' (unchecked), and 'Material Stored Included In Calculated Billing Amount' (checked). The 'Description' tab is also circled in red.

**\*NOTE-** Use the "Description" tab to edit



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## **\*NOTE:**

### **Adding Custom Phase Codes**

- **Field--> Job Setup--> Maintain Cost Codes**
- **Enter job number**
- **Click "Insert" under "Cost Code Detail"**
- **Enter the "Cost Code" and "Description"**
  - **Make sure "Billing" and "Active" boxes are checked**
- **Click "Add/Remove" categories, select the proper cost type**

* Cost Code	Description	Category
00	Division 00	Category

Billing	* Active	* Factorable	Add/Remove Categories
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Add/Remove Categories
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Add/Remove Categories

### **To add on Billing side:**

- **Field-->Job Setup-->Enter Contract**
- **Enter job number**
- **Click the pencil to go to the job**
- **Under "Contract Information", click "Add New Bill Codes"**
- **Select "New Bill Codes Only", click "OK"**
- **Check that the phase code appears down below the billing items window**

Add New Bill Codes

Add New Bill Codes Only  
 Add New Bill Codes And Reset All Groups  
 Add New Bill Codes And Reset Null Groups

OK Cancel

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## 15 - Start Job

- To start job, click on "Job Setup"
- Click on "Start Job"

The screenshot shows the CMiC FIELD interface. At the top, there is a dropdown menu with '24686.00 - LKco Test' selected. Below it is a search bar labeled 'Program Search...'. The main content area shows 'Project: LKco Test (24686.00)' and a 'Workflow Notification' section. Underneath, there is a 'Job Setup' section with a dropdown arrow. Below this, there are four buttons: 'Create Project', 'Update Job Info', 'Enter Contract', and 'Start Job'. The 'Start Job' button is circled in red.

## 16 - Start Job

- Select the job
- Input "Actual Start Date"
- Press "Start Job"

The screenshot shows a table of jobs with columns for ID, Name, and Date. The row for '02171.00 CMiC Playbook Job' is highlighted in green, and its date field 'Feb 02, 2023' is circled in red. A calendar pop-up is visible, showing the date '2' selected. At the bottom left, a 'Start Jobs' button is circled in red.

01017.00	test	Jan 26, 2023	
01020.00	Test	Jan 30, 2023	
02171.00	CMiC Playbook Job	Feb 02, 2023	
12031	Test Project	Jan 23, 2023	
12032	Venuto CMiC Training #1		
12049	mutt cutts	Jan 24, 2023	
12049.00	Mutts Cutts		
12052.00	DH Test Enviro		

