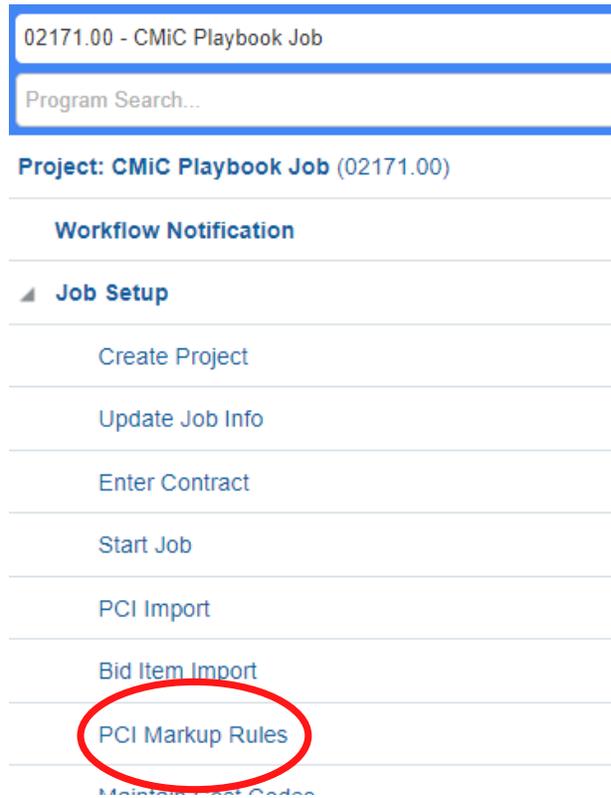


Module 5: Create PCI Markups/ PCI Markup Rules

1

- After logging into CMiC, click on the **blue Field** button
- Click on "Job Setup"
- Click on "PCI Markup Rules"



02171.00 - CMiC Playbook Job

Program Search...

Project: CMiC Playbook Job (02171.00)

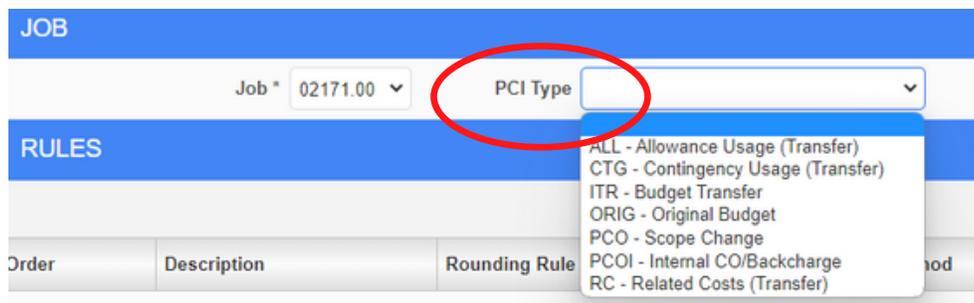
Workflow Notification

Job Setup

- Create Project
- Update Job Info
- Enter Contract
- Start Job
- PCI Import
- Bid Item Import
- PCI Markup Rules**
- Maintain Cost Codes

2

- Select the PCI type you want to set the markup rules



JOB

Job * 02171.00

PCI Type

RULES

Order	Description	Rounding Rule	Method

ALL - Allowance Usage (Transfer)
CTG - Contingency Usage (Transfer)
ITR - Budget Transfer
ORIG - Original Budget
PCO - Scope Change
PCOI - Internal CO/Backcharge
RC - Related Costs (Transfer)

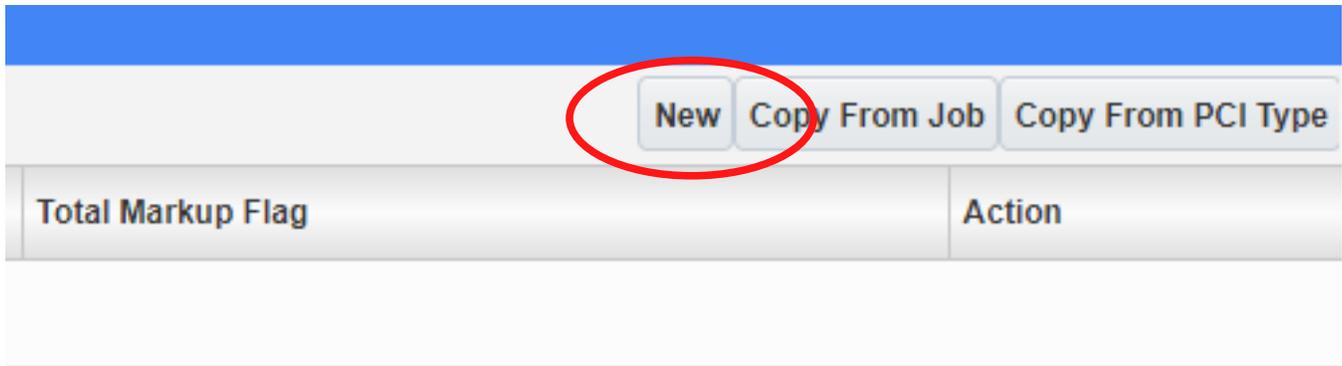
- *NOTE: PCO (Scope Change) is the only type that is an external change order**
 - All other types are either internal change orders or budget transfers



Module 5: Create PCI Markups/ PCI Markup Rules

3

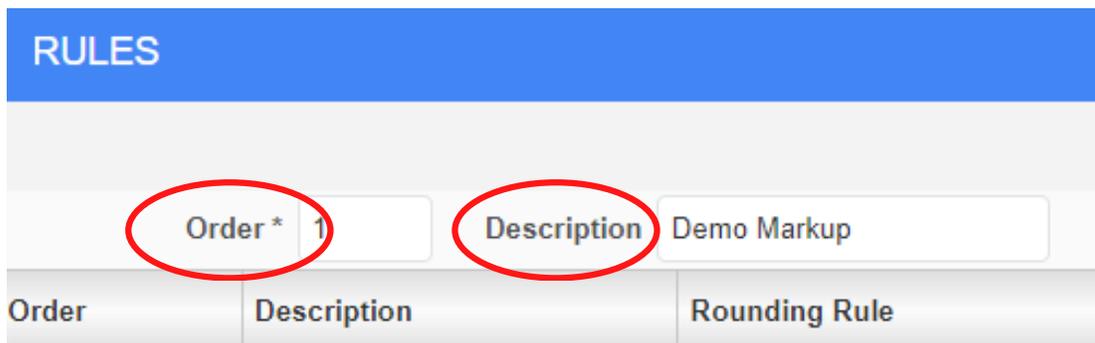
- To add a new markup, click "New"



The screenshot shows a software interface with a blue header bar. Below the header, there are three buttons: "New", "Copy From Job", and "Copy From PCI Type". The "New" button is circled in red. Below the buttons is a table with two columns: "Total Markup Flag" and "Action".

4

- Assign the "Order"
 - This is the order the markups will appear on the the change order
- Add a "Description"



The screenshot shows a software interface with a blue header bar labeled "RULES". Below the header, there are two input fields: "Order*" with the value "1" and "Description" with the value "Demo Markup". Both fields are circled in red. Below the input fields is a table with three columns: "Order", "Description", and "Rounding Rule".



Module 5: Create PCI Markups/ PCI Markup Rules

5

- **Complete the remaining information:**
 - **Rounding Rules** - more often than not you will select "No Rounding"
 - **Rounding Method** - select "Standard"
 - **Level** - this the order in which your markups will calculate

***NOTE:**

Level 1 - Markups calculate on the change order only.

Level 2 - Markups calculate on change order & Level 1

Level 3 - Markups calculate on change order, Level 1 & Level 2

Rounding Method	Level	Total Markup Flag
Standard	1	<input type="checkbox"/>

- **Click "Save"**

Level	Total Markup Flag	Action
	<input type="checkbox"/>	



Module 5: Create PCI Markups/ PCI Markup Rules

6

- Scroll down to "Details" and click the "+" button to fill out additional details to create the markup rule
*NOTE: See Markup Rules Explained for additional notes

DETAILS					
Calculate On				Allocate To	
Action	Job	Phase *	Category *	Job	Phase *
					

7

- Click "Save" when done

   					
Rounding Method	Standard ▾	Level *	1	Total Markup Flag	<input type="checkbox"/>
Level	Total Markup Flag			Action	
1	<input type="checkbox"/>				
1	<input type="checkbox"/>				
1	<input type="checkbox"/>				



Module 5: Markup Rules Explained

***NOTE: When billing below the line, select a change order phase rather than the original contract phase code. This ensures that the markups will be coded to an OCO line**

Other Markup Rules Explained

- **Order:** The order the markup will appear on the PCI
- **Level:** The level is how the PCI calculates

RULES				
Order	Description	Rounding Rule	Rounding Method	Level
5	CDI Markup	No Rounding	Standard	1
6	Permit Markup	No Rounding	Standard	2
7	Insurance Markup	No Rounding	Standard	3
8	CM Fee Markup	No Rounding	Standard	4

***For further explanation, see example below:**

TG Gallagher Added Change	2,000.00		
Added LKCo PM Time	1,500.00		
Subtotal	3,500.00		
LKCo Insurance (1%)	35.00	Level 1 Markups - Calculates on the Subtotal of the change order	(3,500) x 1%
Permits (2%)	70.70	Level 2 Markups - Calculate on the Subtotal of the change order plus the total of all Level 1 Markups	(3,500 + 35.00) x 2%
Fee (3%)	108.17	Level 3 Markups - Calculates on the Subtotal of the change order plus the total of all Level 1 Markups plus the total of all Level 2 Markups	(3,500 + 35.00 + 70.70) x 3%
Grand Total	3,713.87		



Module 5: Markup Rules Explained

- **"Calculate On" is what the markups calculates on**
 - **i.e - For fee, select "ALL" for jobs, "ALL" for phases, and "ALL" for category because you want to calculate on all phases and categories within the PCI**
 - **There are times this will be different. For example: for CDI you will select "ALL" for phases but only select category "Subcontracts" so the markups will only calculate CDI the subcontract PCIs**

DETAILS			
Calculate On			
Action	Job	Phase *	Category *
+ -	ALL <input type="text"/>	ALL <input type="text"/>	ALL <input type="text"/>

- **"Allocate To":**
 - **Select "Inherited" for job**
 - **Select the phase you want the markup to hit**
 - **Select the category**
 - **Add the Budget % and Billing % (this should be the same for both)**

Allocate To					
Job	Phase *	Category *	Calculate On Billing Amount	Budget % *	Billing % *
Inherited <input type="text"/>	990501.00 <input type="text"/>	<input type="text"/>	<input type="checkbox"/>	3.000000	3.000000

