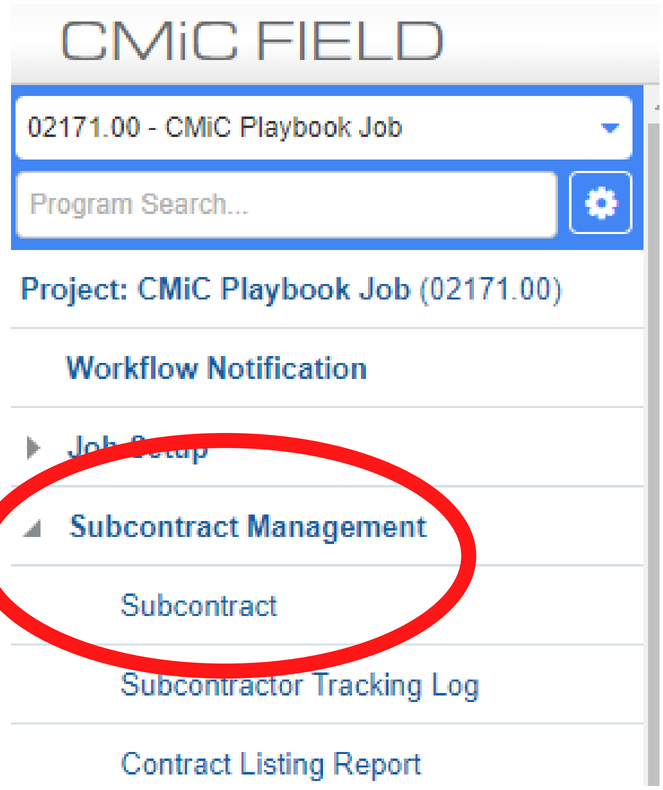
<u>Module 6</u>: Create a subcontract

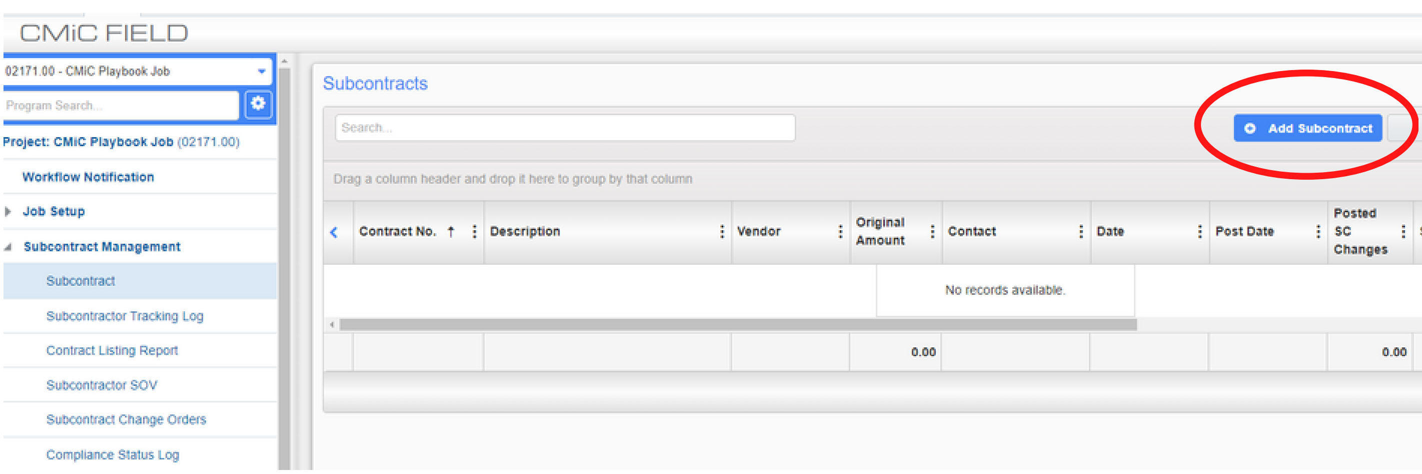
1

- **After logging into CMiC, click on the blue Field button.**
- **Click on "Subcontract Management"**
- **Click on "Subcontract"**



2

- **Click on "Add Subcontract"**
  ***This is a blue box on the right hand side of the screen**



<u>Module 6</u>: Create a subcontract

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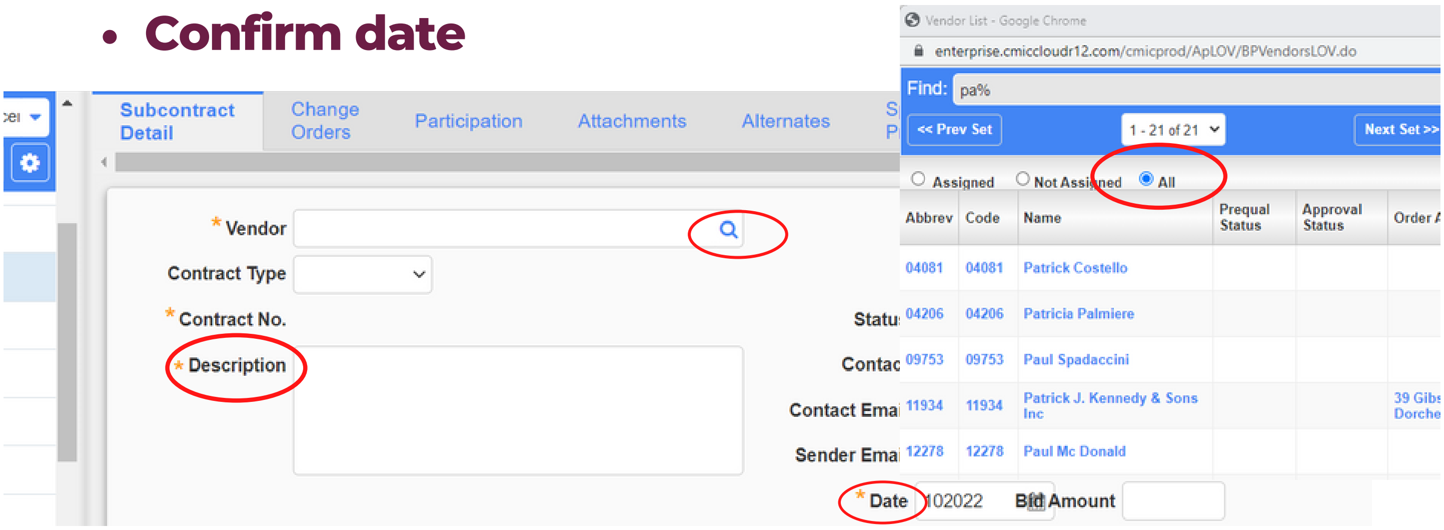
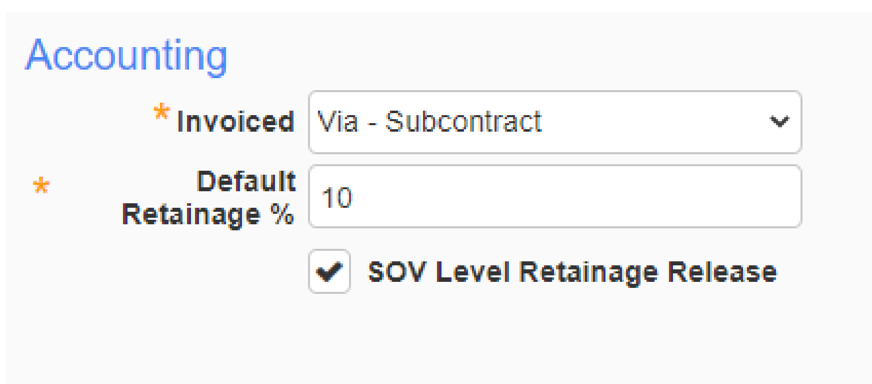
- **Choose the "Vendor" by clicking the magnifying glass**
  - ***NOTE: Click on "ALL" to search for vender**
- **Add a description in the "Description" box**
- **Confirm date**



4

- **Scroll down to Accounting**
- **Confirm**
  - **Invoiced**
  - **Default Retainage %**



Module 6: Create a subcontract

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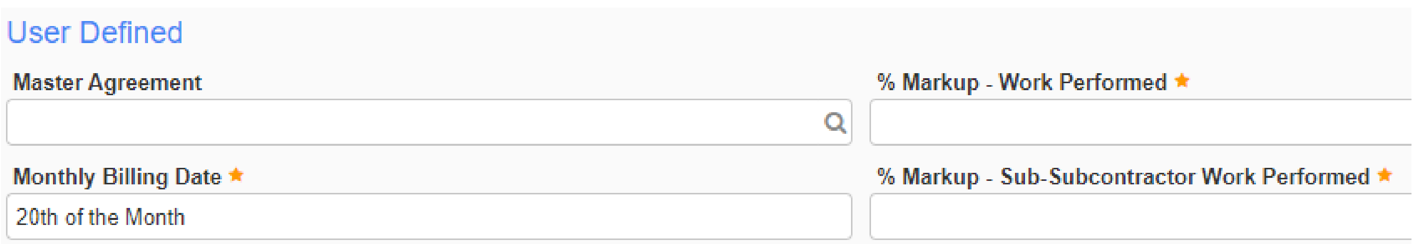
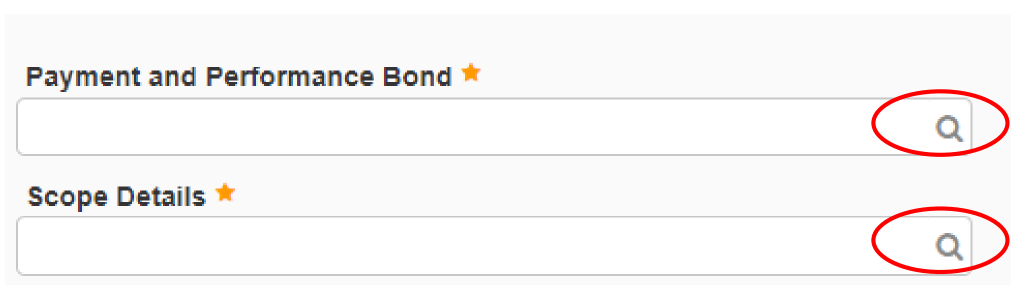
- **Scroll down to "User Defined" and confirm:**
  - **"Monthly Billing Date"**
  - **% Markup**
  - **% Markup - Sub-Subcontractor Work Performed**



6

- **Click the magnifying glass and identify**
  - **Payment and Performance Bond**
  - **Scope Details**



Module 6: Create a subcontract

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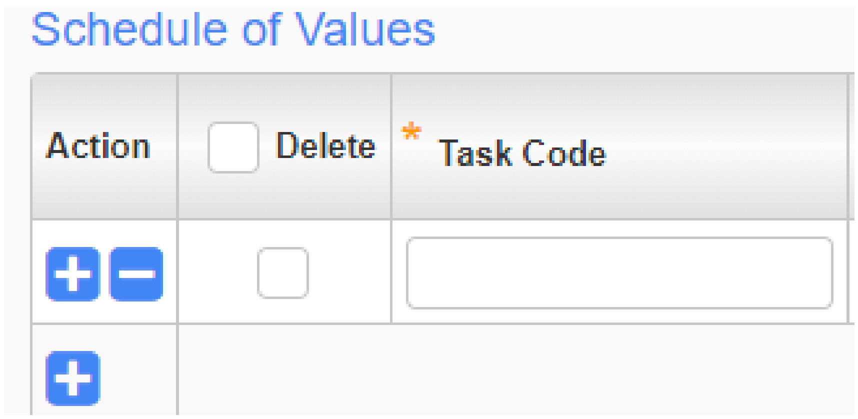
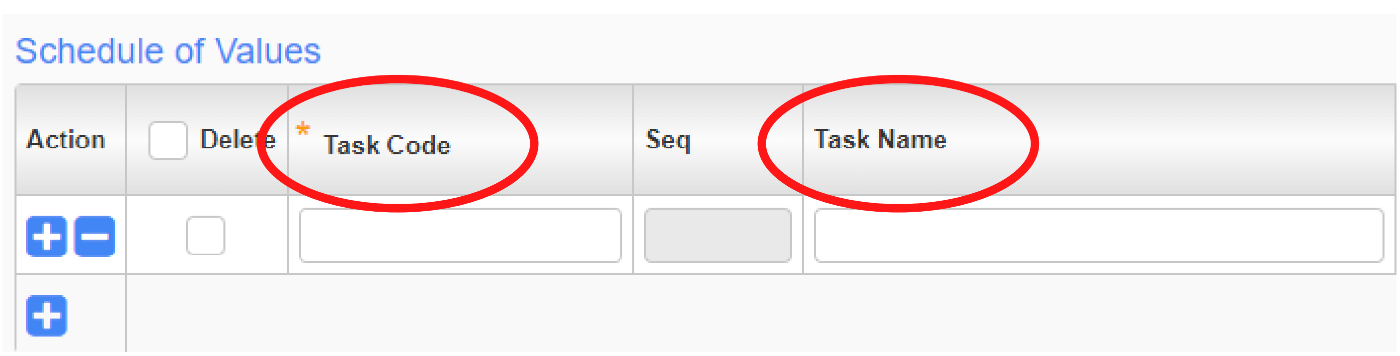
- **Scroll down to "Schedule of Values"**
- **Click the blue "+"**



8

- **Task Code - Input the subcontract line number**
  ***NOTE: In most cases, this will be "01"**
- **Task Name - Type in the line description**



Module 6: Create a subcontract

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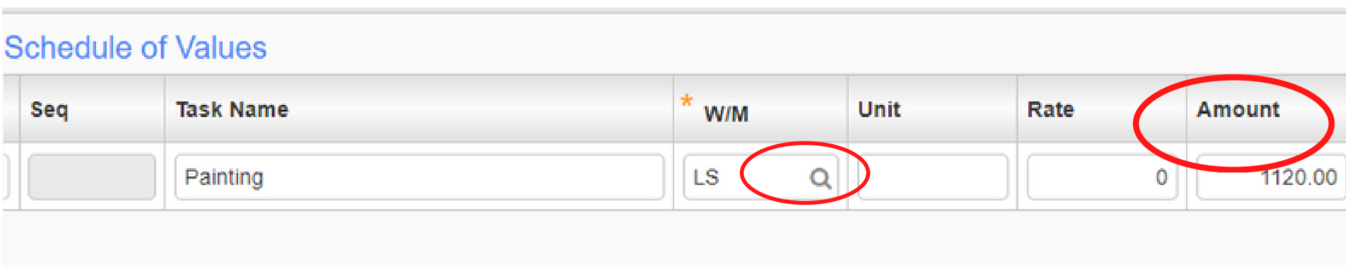
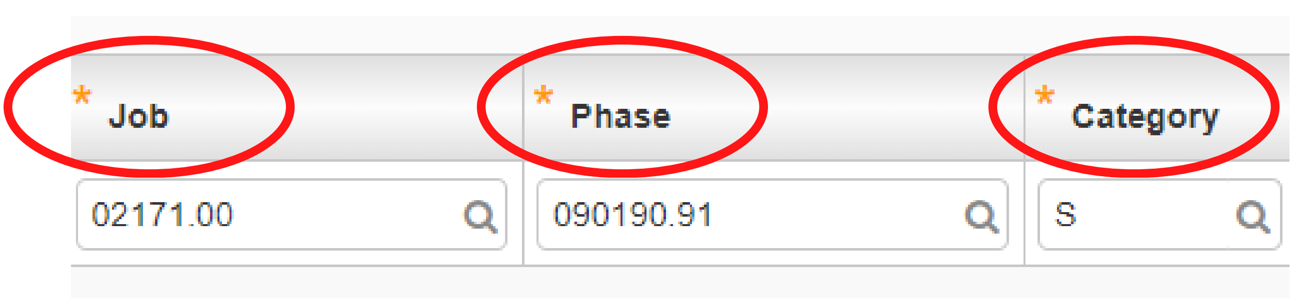
- **Use the magnifying glass to identify:**
  - **W/M - In most cases this will be "LS"**
  - **Amount - Type in the dollar amount**



- **Scroll to the right to complete the line information:**
  - **Job - Select the project number if it does not auto populate**
  - **Phase - Select the phase code**
  - **Category - Select the category code**

    ***Note: this should be "S" for all subcontractor costs**



Module 6: Create a subcontract

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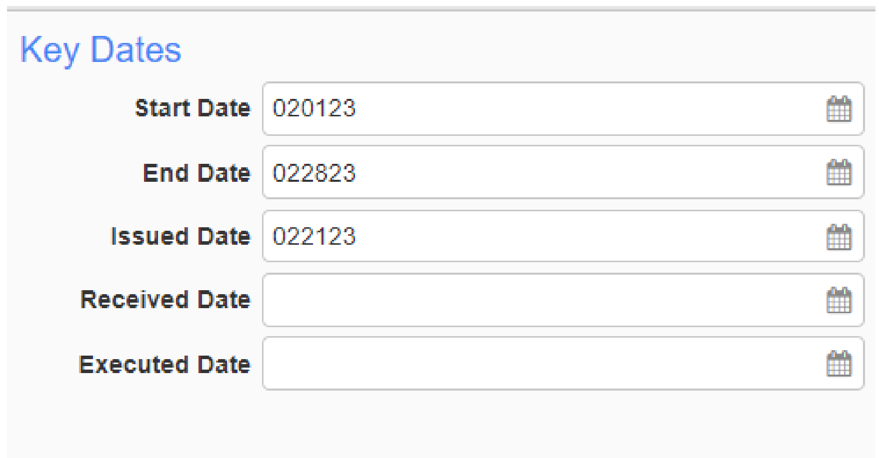
- **Scroll down to "Key Dates"**
- **Input**
    - **Start Date**
    - **End Date**
    - **Issued Date**



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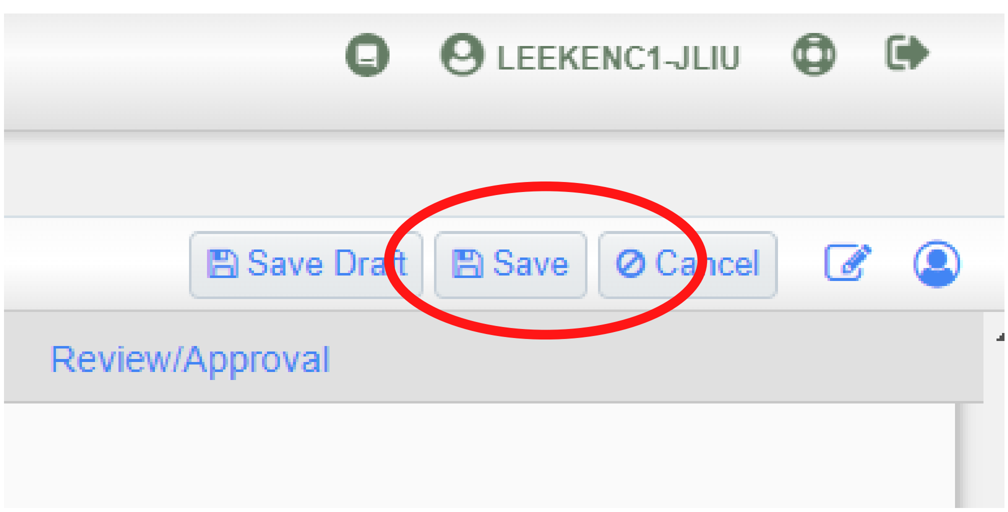
- **Click "Save"**



Module 6: Create a subcontract

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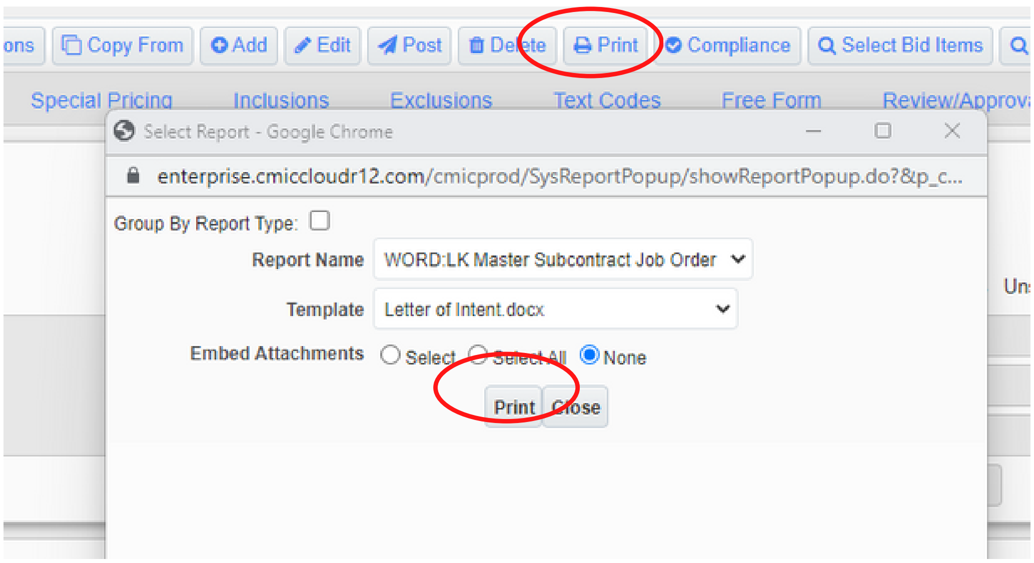
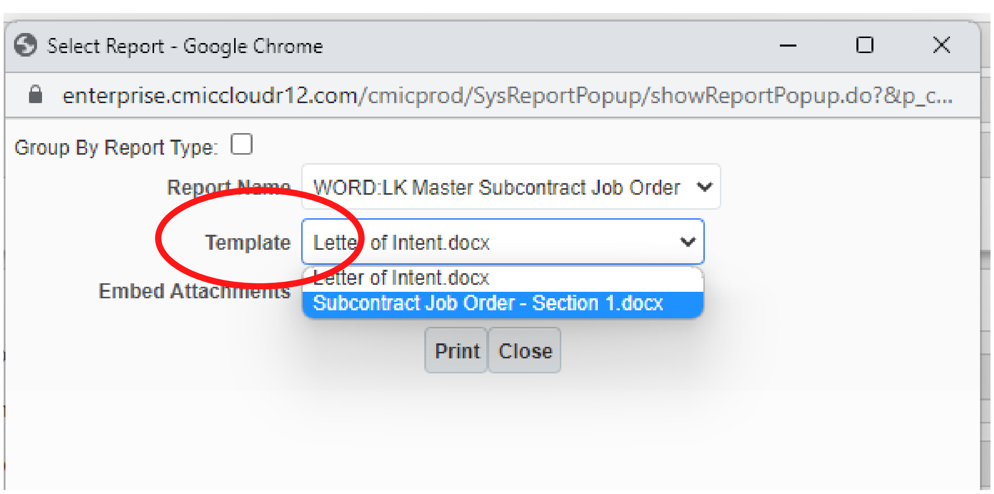
- **To print/run the report - Click "Print" in the top right corner of the screen**

- **Once a new window opens, click "Print" again**



***NOTE**

- **Use the arrow next to "Template" to identify the form to be printed**



Module 6: Create a subcontract

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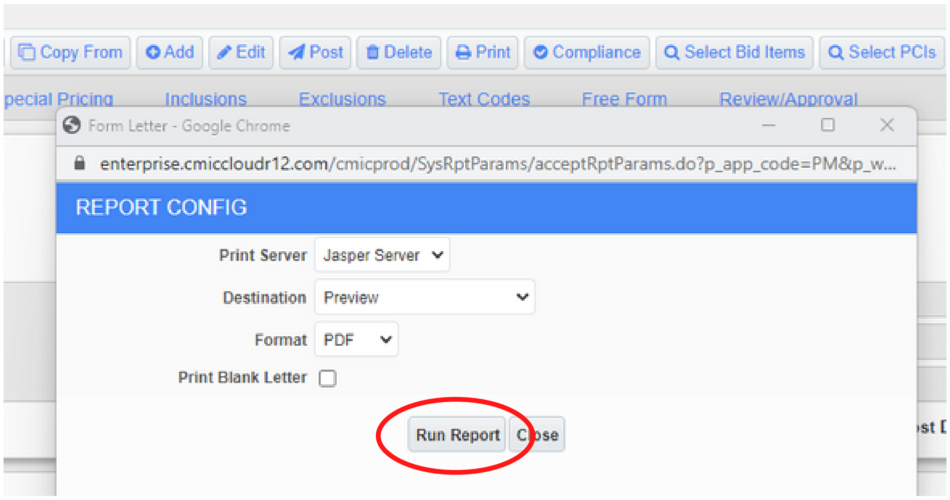
- **Click "Run Report"**



***NOTE- The subcontract should be sent through DocuSign and fully executed before posting**

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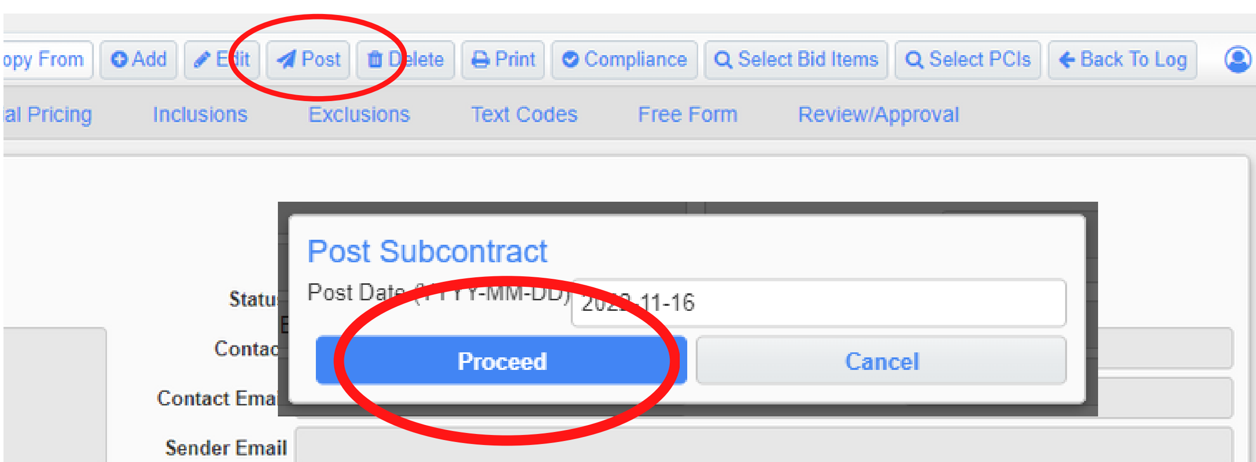
- **To post the subcontract**
  - **Click "Post" in the top right corner**
  - **Click "Proceed"**



<u>Module 6</u>: Create a subcontract

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- **Go back to the tree view on the left side of the screen**
- **Click on "Cost Reporting"**
- **Click on "Current Cost to Date (Live)"**

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- **Click on the 3 dots next to "Spent/Committed" to choose the categories to show on the job**