

# VIDEO INSTRUCTIONS

**\*NOTE: Right click the link to view the video**

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|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Module 1</b> | <ol style="list-style-type: none"><li>1. <u>Create a Project</u></li><li>2. <u>Update Job Info</u></li><li>3. <u>Create Contract</u></li><li>4. <u>Start Job</u></li></ol> |
| <b>Module 2</b> | <ol style="list-style-type: none"><li>1. <u>Project Maintenance</u></li></ol>                                                                                              |
| <b>Module 3</b> | <ol style="list-style-type: none"><li>1. <u>Import a Budget</u></li></ol>                                                                                                  |
| <b>Module 4</b> | <ol style="list-style-type: none"><li>1. <u>Manual Budget Setup</u></li></ol>                                                                                              |
| <b>Module 5</b> | <ol style="list-style-type: none"><li>1. <u>Create PCI Markups/ PCI Markup Rules</u></li><li>2. <u>Markup Rules Explained</u></li></ol>                                    |
| <b>Module 6</b> | <ol style="list-style-type: none"><li>1. <u>Create a subcontract</u></li><li>2. <u>Print/Run Report</u></li></ol>                                                          |

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| <b>Module 7</b>  | <ol style="list-style-type: none"><li>1. <u>Create a PCI</u></li><li>2. <u>VOID PCI</u></li></ol>                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Module 8</b>  | <ol style="list-style-type: none"><li>1. <u>Create an owner change order</u></li></ol>                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Module 9</b>  | <ol style="list-style-type: none"><li>1. <u>Create a subcontractor change order</u></li></ol>                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Module 10</b> | <ol style="list-style-type: none"><li>1. <u>Set up first bill</u></li><li>2. <u>Create new owner bill</u></li><li>3. <u>Include change orders in your bill</u></li><li>4. <u>Assigning job cost transactions to owner bill</u></li><li>5. <u>Exporting reqs GCPay/ Add SC cost to bill</u></li><li>6. <u>Bill lump sum line items inc. fee and insurance</u></li><li>7. <u>Clearing billing and retainage overrides</u></li><li>8. <u>Printing the bill and backup</u></li></ol> |

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| <b>Module 11</b> | <b>1. <u>Project Financial Management Slideshow</u></b><br><b>2. <u>Update/Print Cost Report</u></b> |
| <b>Module 12</b> | <b>1. <u>Approving Invoices</u></b>                                                                  |