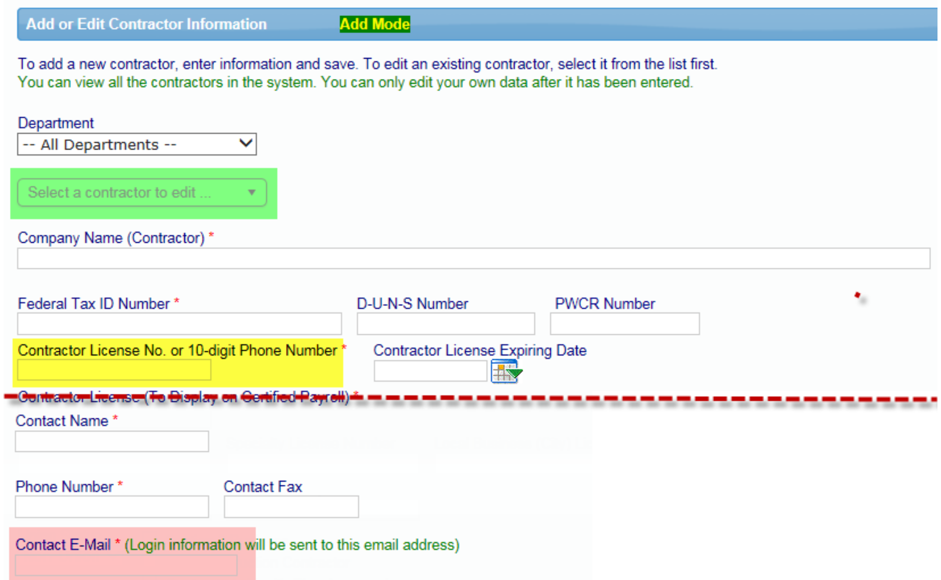
SUBCONTRACTOR SETUP

You will set up the subcontractor below you, and each contractor is responsible for setting up their own subs. Once you've set up your sub, they'll log into their account and then set up any subs beneath them. Their subs will then set up their own subs, and so on and so forth.

Contractor Set Up is a two-step process:

Step 1: Contractor Setup > Add/Edit Contractor



To add, simply fill in the data. Complete the data fields with information provided by your subcontractor. If it is a new entry, ignore the **Select a contractor to edit drop down**. If this is an existing user, you may have read-only access to their information.

Some contractors may already be a user of LCPtracker under another agency database. Ask your subcontractor if they are a current user of LCPtracker. If they are, ask them for their User ID that they currently use to log into the LCPtracker system. You will still be setting this company up with a "new" account under the Agency you are working in. Set them up with the same user ID under your Agency, and the system will automatically link their accounts for them. This prevents them from having to use multiple user ids.

The field marked **Contractor License No. or 10-digit Phone Number** is the field that ultimately becomes the user's ID number, and where you'll enter their existing user ID to link accounts if they have them.

Continue to enter in the rest of the required information on the Subcontractor Setup page and **Save**

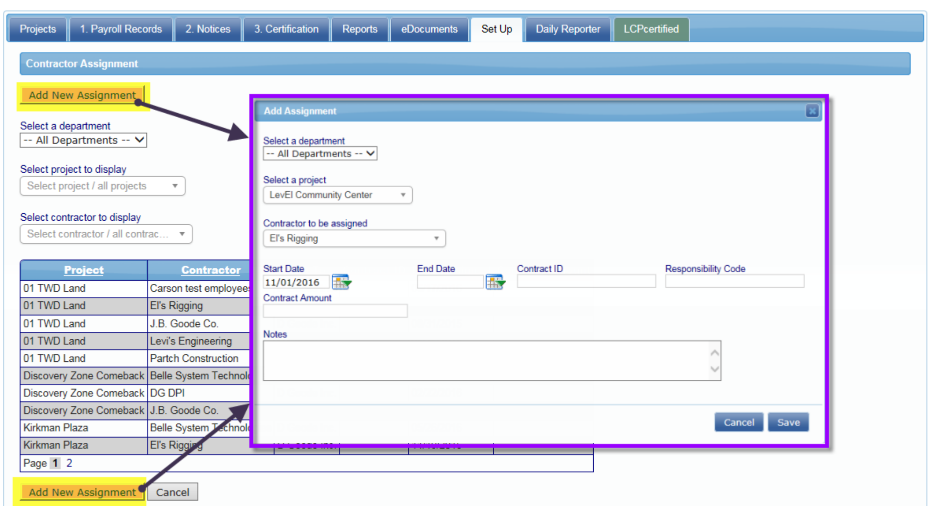
The ***email data field is critical*** as this is how the LCPtracker Program is designed to communicate with system users. Please be sure the email address supplied is correct prior to saving the information to the database. Red asterisks fields are required in order for the system to **Save** information. Some Agencies may have additional requirements. When you are satisfied the information is correct, click **Save**. You will receive a pop-up telling you “Contractor has been sent an email notifying them. Don’t forget to assign this Contractor to project”.

LCPtracker system will automatically email the subcontractor their User ID and Temporary Password.

Step 2: Contractor Setup > Contractor Assignment

The next step after you have setup your subcontractors in the system is to assign them to the project(s).

You can click on **Add New Assignment**, on the top or the bottom



Select a department – *Optional*, some agencies do not use this selection. You may choose the ‘Unassigned Contractors” to make the list shorter to view.

Select a project – You need to choose the Project that you are assigning your Subcontractor to.

Contractor to be assigned – Choose the Subcontractor you need to assign to Project as your Subcontractor. This is usually the Subcontractor you just set up in the system. Some however are already in the system under this Agency and you just need to assign them to the Project as your Subcontractor. (See next screen shot).

Start Date – Required by some Agencies, typically the date that your Subcontractor is to/or has started working on the project.

End Date – *Optional field*, some agencies want this information.

Contract ID – *Optional field*, some agencies want this information. The Contract ID is the ID of the contract between you and the subcontractor. If you do not have a Contract ID or numbering system be sure to assign a unique ID to this contract.

Responsibility Code – *Optional field*, some agencies want this information.

Contract Amount – *Optional field*, some agencies want this information. This is the amount of the contract between you and your subcontractor.

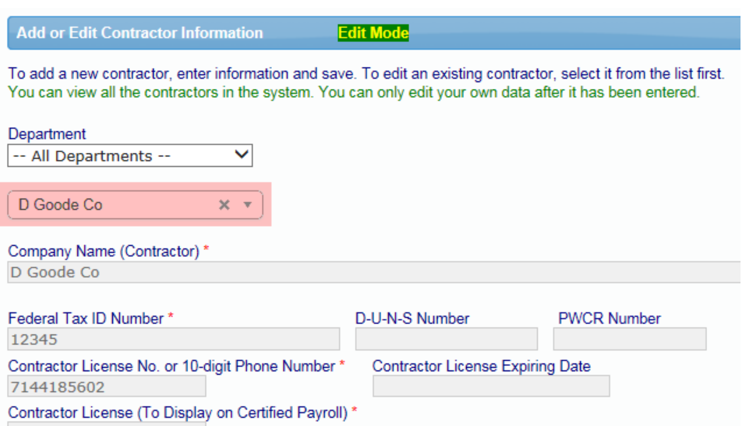
Notes – *Optional field*, some agencies want this information or you may choose to add your own notes.

After you have made your choices from the drop down and entered any required information, be sure to **Save**. Once you've saved, your sub will be sent a second email informing them they've been assigned to a project.

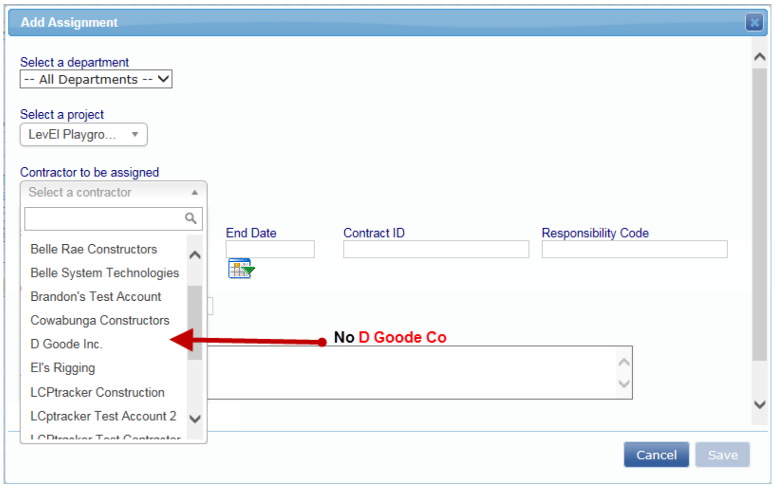
You will now see a saved **contractor assignment** listed in the Contractor Assignment Screen. The Date Assigned is a system generated Date Stamp. This is the date that the Contractor was assigned to the project.

MULTIPLE CONTRACTOR ASSIGNMENTS

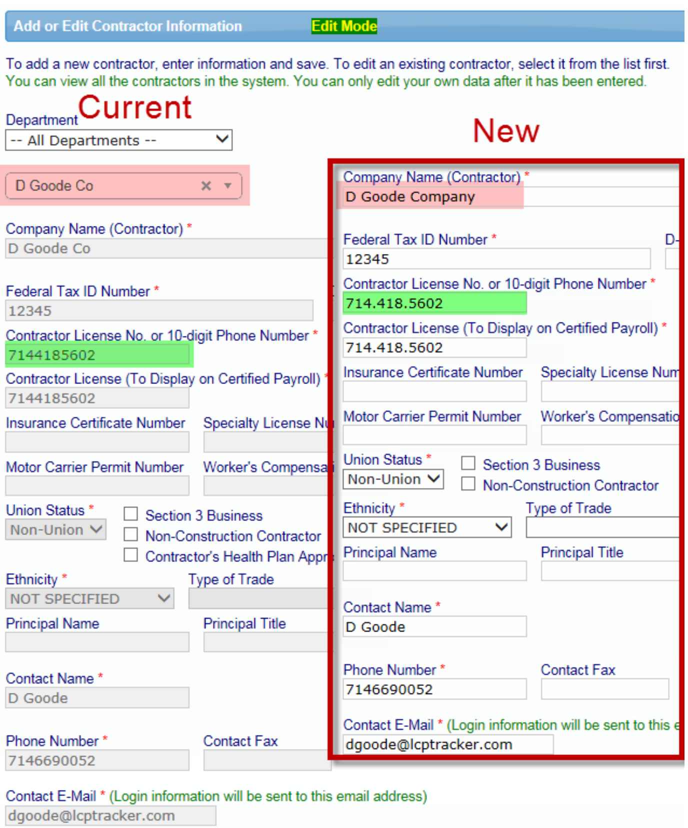
If you're finding a subcontractor has an existing account:



But you're not able to find them when assigning them to a project:



Chances are they already have an existing assignment to that project under a different general contractor. In this situation, you'll need to create a new account for them under subcontractor setup, being sure to use a slightly different company name and user ID:



Then you'll be able to assign the new account as a sub to you: