

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

Add or Edit Contractor Information Add Mode
To add a new contractor, enter information and save. To edit an existing contractor, select it from the list first. You can view all the contractors in the system. You can only edit your own data after it has been entered.
Department All Departments V
Company Name (Contractor) *
Federal Tax ID Number * D-U-N-S Number PWCR Number *
Contractor License No. or 10-digit Phone Number
Contact Name *
Phone Number * Contact Fax
Contact E-Mail * (Login information will be sent to this email address)

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.

Phone: 714-669-0052 x 4 **Email:** <u>support@lcptracker.com</u> **Web:** lcptracker.com | © LCPtracker, Inc. – Confidential. Do not release or distribute in any way without express written consent of LCPtracker, Inc



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".

<u>LCPtracker system will automatically email the subcontractor</u> 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).

Projects 1. Payroll Reco	rds 2. Notices	3. Certification Reports	eDocuments	Set Up Daily F	Reporter LCPcertified	
Contractor Assignment						
Add New Assignment Select a department All Departments Y Select project to display		Add Assignment Select a department All Departments V				
Select project / all projects Select contractor to display Select contractor / all contr	▼ ac ▼	LevEl Community Center Contractor to be assigned El's Rigging	• •	0		
01 TWD Land	Contractor Carson test employe	e: Contract Amount	End Date	Contract ID	Resp	onsibility Code
01 TWD Land 01 TWD Land 01 TWD Land 01 TWD Land Discovery Zone Comeback	El's Rigging J.B. Goode Co. Levi's Engineering Partch Construction Belle System Techno	Notes				0
Discovery Zone Comeback	DG DPI					
Discovery Zone Comeback	J.B. Goode Co. Belle System Turbur					Cancel Save
Kirkman Plaza	El's Rigging					
Page 1 2 Add New Assignment	Cancel	· · ·				

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:

To add a new contractor, enter information You can view all the contractors in the sy	on and save. To edit an existing co /stem. You can only edit your own	ontractor, select it from the list fir data after it has been entered.
Department All Departments 🗸		
D Goode Co × •		
D Goode Co		
Federal Tax ID Number * 12345	D-U-N-S Number	PWCR Number
Contractor License No. or 10-digit Phone 7144185602	Number * Contractor License	Expiring Date
Contractor License (To Display on Certifi	ied Pavroll) *	

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Add Assignment					×
Select a department All Departments V					^
Select a project					
Select a contractor					
	Q,				
Belle Rae Constructors		End Date	Contract ID	Responsibility Code	
Belle System Technologies	~				
Brandon's Test Account	II.				
Cowabunga Constructors					
D Goode Inc.	┡	N	lo D Goode Co		
El's Rigging				^	
LCPtracker Construction				~	
LCptracker Test Account 2	\sim				~
LODtracker Test Contractor					_
				Cancel	Save

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:

Department Currer	nt ~	Nev	v
D Goode Co	× •	Company Name (Contractor) D Goode Company	*
Company Name (Contractor D Goode Co	r) *	Federal Tax ID Number * 12345	D
Federal Tax ID Number *		Contractor License No. or 10- 714.418.5602	digit Phone Number *
Contractor License No. or 1 7144185602	0-digit Phone Number *	Contractor License (To Displa 714.418.5602	y on Certified Payroll) *
Contractor License (To Disp 7144185602	lay on Certified Payroll)	Insurance Certificate Number	Specialty License Nur
Insurance Certificate Number	er Specialty License N	Motor Carrier Permit Number	Worker's Compensati
Motor Carrier Permit Numbe	er Worker's Compensa	union Status * □ Section Non-Union ✔ □ Non-Ce	n 3 Business onstruction Contractor
Union Status * 🔲 Secti	on 3 Business	Ethnicity *	Type of Trade
Non-Union ➤ □ Non-	Construction Contractor	NOT SPECIFIED V	
Cont	ractor's Health Plan App	Principal Name	Principal Title
Ethnicity *	Type of Trade		
NOT SPECIFIED V		Contact Name *	
Principal Name	Principal Title	D Goode	
o		Phone Number *	Contact Fax
D Goode		7146690052	
5 55566		Contact E-Mail * (Login inform	ation will be sent to this
Phone Number *	Contact Fax	dgoode@lcptracker.com	auon will be sent to this
7146690052			



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

Add Assignment						×
Select a department All Departments V						^
Select a project LevEl Playgro ▼						
Contractor to be assigned						
Select a contractor	9					
ABC Concrete & Cutting	•	End Date	Contract ID	Re	sponsibility Code	
Belle Construction Inc.						
Belle Rae Constructors						
Belle System Technologies						
Brandon's Test Account						
Cowabunga Constructors					^	
D Goode Company					\sim	
D Goode Inc.	~					~
El's Rinning						
					Cancel	Save