

Creating Subcontracts for Lump Sum Items, Lump Sum Contracts and Pushbutton Contracts

When setting up subcontracts in SiteManager in these instances we run into a program limitation that will not allow us to exceed the plan quantity for a contract item.

The way we have chosen to handle these situations is to select a unit of measure other than the unit set for the pay item you wish to use. This will allow you to exceed the plan quantity as well as the unit price should the situation call for it.

REMEMBER: Use the tab key to move from field to field. SiteManager likes it better.

- On the **Contract Administration** panel, select **Contractor Management** then select **Subcontracts**.
- From the Services drop down menu, select Choose Keys.
- Click on the **New** button (looks like a white piece of paper) on the tool bar to create a blank screen, if needed.
- On the **Description** tab, enter the **SubCont Nbr** and the **Parent SubCont Nbr**, if needed.
- Search for and select the desired **Subcontractor** from the list.
- Select the **Subcontract Type** from the drop-down list.
- Select appropriate **Work Type** for drop-down list.
- IMPORTANT: Enter **Approval Date**. Without it you can't report work to the subcontractor.
- Save.
- Click on Items tab.
- Select the **Prj Nbr**. from the drop-down list.
- Enter the appropriate **Line Item** or search for and select it from the list.
- On the **This Subcontract** line, set the **unit** of measure to **UNITS**.
- Go back to the **Quantity** field and enter the quantity as 1.0 for Lump Sum items and contracts or as appropriate for pushbutton contract items.
- Tab to **Price** field and enter appropriate price. If this price exceed the contract price you will receive a message that states: "Subcontract price exceeds bid price. Do you wish to proceed?", click OK if the price you entered is correct.
- Save.
- Click on the **New** icon and repeat item selection and detail instructions if additional items are to be entered for this subcontract.