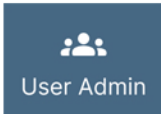


Key Steps for Getting Started with eSUB Cloud

Welcome to eSUB!

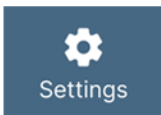
Follow these initial steps to get started: <https://esubcloud.com/login>

1. Permission Groups ?



Recommended at least an 'Admin' and 'Field Foreman' permission group.

2. Labor Rates ?



Labor Rates > Rate Templates/Labor Classes

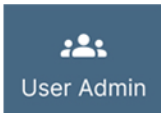
A. Add Labor Classes

- Example labor classes: Foreman, Journeyman, Laborer, Apprentice.

B. Add Rate Template

- Example: Standard Pay Rates and Prevailing Wage Pay Rates.

3. Standard User & Crew Member ?



Standard User: A Standard User is anyone who will need a login to access eSUB's tools.

- If an employee needs login access and tracked hours, create them as a Standard User with the Crew Designation "User is a crew member" box checked.

Crew Member: A Crew Member is an employee who is only used for tracking labor hours via Daily Reports. A Crew Member will not have login access.

4. Cost Codes ?



Cost Codes are used to break down a project's expenses into different activities and cost categories. Using cost codes effectively can enhance

the job cost reporting details on your projects so that your organization can become more cost-efficient when budgeting jobs.

It is highly recommended that you review your cost code list with your Strategic Consultant prior to importing.

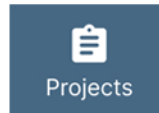
5. Resources ?



Your Contact Log can be populated with your various business contacts so that your Users can easily email documents to project stakeholders with less effort. Your Contact Log can be populated with your various business contacts so that your Users can easily email documents to project stakeholders with less effort. Your contacts may include (but are not limited to) vendors, owners, general contractors, subcontractors, etc.

IMPORTANT: "AP Vendor" should be checked if you are going to use the vendor on a Purchase Order.

6. Create Project ?



Address – Must include zip code to populate daily report weather.

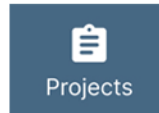
Contract Amount – Pulls into the Job Cost Report.

7. Upload Logo ?



Your logo will print in the top right of all eSUB PDFs personalizing documentation sent to clients.

8. Review/Update Project Settings ?



From the project log, select a project to update the project settings.

SETTINGS

Project Info

Cost Codes

Budgets

Documents

Members