14 Exporting A Contractor Read-Only File

Working with FieldManager software requires frequent exchange of information between FieldManager and contractor computers with the FieldManager Read-Only application.

14.1 Exporting Read-Only Contract File to FieldManager Read-Only (Prime Contractor)

Prime Contractors have the option to purchase FieldManager Read-Only directly from the vendor, Info Tech (https://www.infotechfl.com/field_manager), so they can review their contract data in the software. The contractor will make a request to the RE to receive an exported copy of the FieldManager contract file.

Bi-weekly, after you generate estimates, you will need to export and email the read-only contract file to the contractor, so they can import it into FieldManager Read-Only. This will refresh their contract file, so they have the most current contract information (i.e. quantities, payments and Contract Modification).

1. To export the read-only contract, select the desired contract from the Contracts list. From the **File** menu choose **Export**, and then choose **Transfer Contracts…** from the Export submenu. As shown in Figure 14-1, you will need to select the contract that you want to export and then click on the **Select** button.
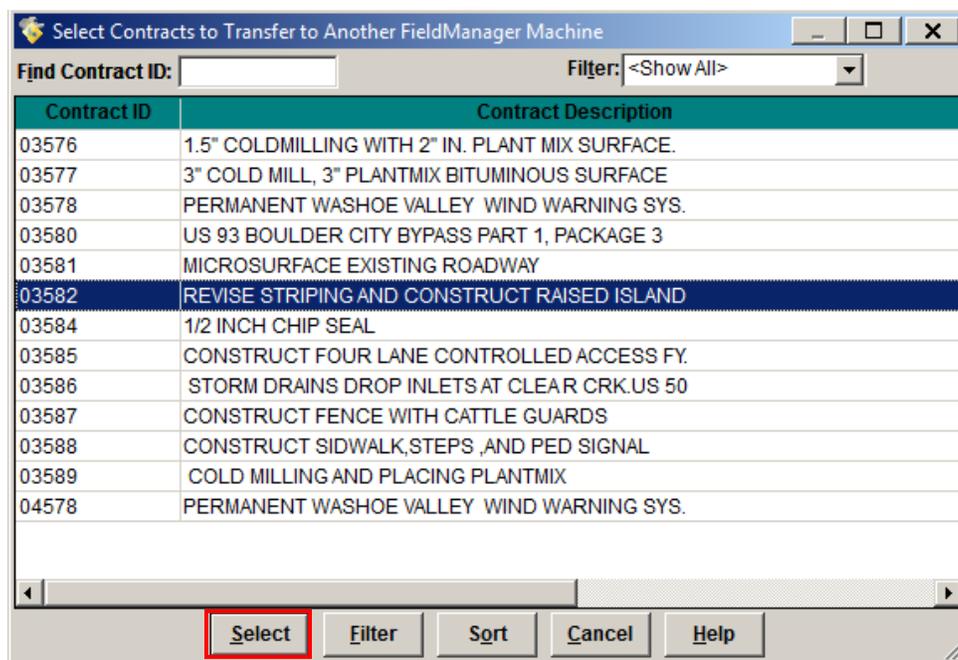

Figure 14-1. Select Contracts to Transfer to Another FieldManager Machine Window

2. The Transfer Contract to Another FieldManager window will appear (Figure 14-2). Select the **Create a contractor read-only copy of the contract** option (DO NOT include attachments) and click on the **Ok** button.

Figure 14-2. Transfer Contract to Another FieldManager Window

3. The Select Transfer File window will appear (Figure 14-3). Click on the dropdown arrow in the Save In box and select your Removable Disk E or a share drive. Change the File Name to your contract ID (i.e. 03582.cro). Click on the **Save** button.
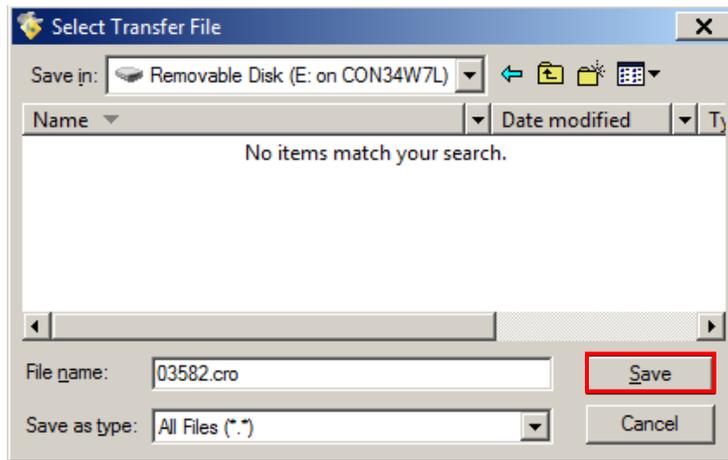

Figure 14-3. Select Transfer File Window

4. The contract will export and the Export window (Figure 14-4) will open when it has completed. Click on **OK**.

Figure 14-4. Export Window

5. Attach the exported contract file (i.e. 03582.cro) to an email and send it to the contractor.