

## CMM WEB SITE INSTRUCTIONS

<https://ConstructionMoneyManagement.com>

### Quick Start Instructions

1. **Home** – Returns you to the main menu screen (Top left side of screen)
  - a) **Welcome - User Name - Edit Profile – Log Out** (Top right side of screen)  
Allows you to update your business contact information.
2. **Create New Account** – (Bottom of screen)
  - a) Member Registration – Select Member Type from list - Complete information in BOLD
  - b) After review and approval CMM will setup your account and email you confirmation.
  - c) **Sign in** – Enter **User Name, Password** (Capital and space sensitive) Select **Login – I Agree**
3. **Registration - Create New - Notice of Commencement (NOC)** (Top left side of screen)
  - a) Select Search tab (Top right side of screen)  
Enter Project Address: Example 12345 select **Search**  
If the project Address **is** listed, go to Step 4 Edit (NOC) or add (NOF) go to Step 5  
  
If project address **is NOT** listed - select **Registration** tab - **Notice of Commencement – New**  
Complete required information in bold.  
Add Files - Select parties to email NOC - Save
  - b) If property owner name, general contractor or lender names are **NOT** listed create a new account for each. (Step 2)
4. **Edit - Notice of Commencement (NOC)**
  - a) Select Search tab – Enter project address – Example: 12345
  - b) Select EDIT – Make changes
  - c) Add Files - Select parties to email NOC
  - d) Update – View - Email
5. **Create or Edit - Notice of Furnishing (NOF)**
  - a) Select Search or Registration tab – Enter project address – Example: 12345
  - b) Select NOF + or Edit - Complete information
  - c) Add Files - Select parties to email NOF
  - d) Update – View – Email – Save
6. **Completion – Closing**
  - a) Select Search tab – Enter project address – Example: 12345
  - b) Select Completion
  - c) Select parties to email report
  - d) Select format – Excel or PDF – Export – Report is created – Download, Save or Print

Note: Access to the report is limited to the General Contractor who created the NOC.

**7. Full Disclosure Report**

- a) Select Search tab – Enter project address – Example: 12345
- b) Select Full Disclosure report
- c) Select parties to email report
- d) Select format – Excel or PDF – Export – Report is created – Download, Save or Print

Note: Access to report is limited to the General Contractor who created the NOC.

**8. Services** ( Top left side of screen) Pull down menu options

- a) Contract forms – Complete information - Submit
- b) Credit reports – Complete information - Submit
- c) Lien Satisfaction – Complete information – Add files – Download – Select Parties - Submit
- d) Prelien, Intent to Lien, Lien, Bond – Complete information – Add Files – Select Parties - Submit
- e) Lien Waiver – Complete information – Add Files – Select Parties - Submit
- f) Title Search – Complete required information – Add Files – Submit

**9. Referrals** - (Top middle part of screen)

- a) Select tab – Referral
- b) Complete information: Business name, Address, City, State, Zip, Phone #, Business Type, Join

**10. Solutions** – (Top middle side of screen)

- a) Select tab – Solutions
- b) Select the business or government link to their web site.

**11. Search** – (Top right side of screen) Look up project information by address, street name, city, county, state or Zip code.

- a) Select Search tab – Enter project address – Example: 12345

**12. Pricing** - A complete list of our pricing for our services can be viewed.

**Feel free to call or email us with ANY questions.**

**Construction Money Management, LLC**

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## CMM WEB SITE INSTRUCTIONS

<https://ConstructionMoneyManagement.com>

### Web site Instructions

1. **Home** – Returns you to the main menu screen. (Top left side of screen)
  - a) **Welcome - User Name - Edit Profile – Log Out** (Top right side of screen)  
Allows you to update your business contact information.
2. **Create New Account** – (Bottom of screen)
  - a) Member Registration – Select Member Type from list - Complete information in BOLD  
Member Type: Bonding Company, Contractor, Lender, Other, Property Owner, Subcontractor, Supplier, Title Company  
Note: A contractor may at times be a property owner or subcontractor. Set up separate accounts for each.
  - b) After review and approval CMM will setup your account and email you confirmation.
  - c) **Sign in** – Enter **User Name, Password** (Capital and space sensitive) – select **Login** – select **I Agree**  
Note: The User Name and Password can be updated and changed at any time by the User.  
Instructions: Select Edit Profile – Complete changes - Submit
3. **Registration - Create New - Notice of Commencement (NOC)** (Top left side of screen)
  - a) Select Search tab (Top right side of screen)  
Enter Project Address: Example 12345 select **Search**  
If Project address is listed, go to Step 5 add Notice of Furnishing (NOF)  
  
If project address is **NOT** listed - select **Registration** tab - **Notice of Commencement – New**  
Complete required information in bold.  
Address # (Ex: 12345) Street Name: (Ex: Oak Street)  
City: (Ex: Oakdale) State: (Ex: MN)  
Start Date: (Ex: 1/2/2019) Est Completion Date: (Ex: 2/3/2019)  
Project Type: Govt or Private Commercial or Residential Addition or New  
(Select options that best describe the project)
  - b) Select Property Owner name, General contractor, Lender, Bonding, Title names from pull down tab.  
Scroll down list or begin typing the name to select name from the list.  
  
If the name is **NOT** listed create a new account for each name you can identify. (Follow Step 2)  
Complete new name(s), Address, Phone #, Email  
After review and approval CMM will setup name(s) and email confirmation.
  - c) Add files – Select parties to email NOC - Save

#### **4. Edit - Notice of Commencement (NOC)**

- a) Select Search tab – Enter project address – Example: 12345
- b) Select EDIT – Make changes
- c) Add Files - Select parties to email NOC
- d) Update – View – Email

Note: For security reasons only the original General Contractor who entered the NOC can edit the NOC.

#### **5. Create or Edit - Notice of Furnishing (NOF)**

- a) Select Search or Registration tab – Enter project address – Example: 12345
- b) Select NOF + or Edit    Complete required information.
  - Start Date: (Ex: 1/2/2019)      Est Completion Date: (Ex: 2/3/2019)
  - Materials Provided: (Add description of material and labor. Ex: Framing material and labor)
  - Estimated Charges: (Ex: \$10,123.45)    Balance Due: (Ex: \$5,678.90)
  - Hired By: (Ex: Joe & Jane Homeowner)
  - Phone: (Ex: 651-123-4567)      Fax: (Ex: 651-123-4568)
  - Email: (Ex: [JoeJaneHomeowner@gmail.com](mailto:JoeJaneHomeowner@gmail.com))
- c) Add Files - Select parties to email NOF
- d) Update – View – Email – Save

Note: For security reasons only the original subcontractor or material supplier who entered their NOF can edit their NOF.

**6. Completion – Closing Report:** Send notice to parties of completion or closing of project, lists completion date, closing date, title company contact information.

- a) Select Search – Enter project address – Example: 12345 – Search
- b) Search Results – Select Completion Report
- c) Select Parties to email report
- d) Print Report – Print Options – Select a Format (Excel or Acrobat PDF)
- e) Select Export – File is created – Download, Save or Print

Note: For security reasons access to the report is limited to the original contractor, lender or title company who entered the NOC can obtain the Completion Closing Report.

**7. Full Disclosure Report:** Lists subcontractors and material suppliers who provided labor and or materials by project address. Report lists estimate, balance due, start and completion dates reported by subcontractor or materials supplier.

- a) Select Search – Enter project address – Example: 12345 – Search
- b) Search Results – Select Full Disclosure
- c) Select Parties to email report
- d) Print Report – Print Options – Select a Format (Excel or Acrobat PDF)
- e) Select Export – File is created – Download, Save or Print

Note: For security reasons access to the report is limited to the original general contractor who entered the NOC can obtain the Full Disclosure Report.

**8. Services** ( Top left side of screen) Pull down menu options

**Contract Forms** - Business contract forms to document your services and agreement.

- a) Complete information requested: Business Name, Address, Phone, Fax, E-mail
- b) Required Form: Pull down tab
  - Contractor to Property Owner
  - Contractor to Sub-contractor
  - Contractor to Material Supplier
  - Sub-contractor to Sub-contractor
  - Sub-contractor to Material Supplier
- c) Project Type 1: Pull down tab – Select: Government or Private  
Project Type 2: Pull down tab – Select: Residential or Commercial  
Project Type 3: Pull down tab – Select: New Construction or Remodel
- d) Please return by: Pull down tab – Fax, Mail or Email
- e) Format: Select – MSWord or PDF
- f) Add Files - If you want a copy of your estimate attach the file from your computer directory.
- g) Submit Request – The Contract Forms will be sent to you as requested.

**Credit Reports** – Provides business information about years in business, licensing, legal and judgment history.

- a) Complete information: Business Name, Address, City, State
- b) Please return by: Pull down tab – Fax, Mail or Email
- c) Submit Request – The Credit Report will be sent to you as requested.

**Lien Satisfaction** – After a lien is filed a lien satisfaction is required to release the lien from the property record.

- a) Project – Pull down tab – Select project address from list or complete project information
- b) Project Address, City, State
- c) Legal Description: Lot #, Block #, Addition Name, PIN X
- d) Document # When a lien is recorded a document # is assigned by the County. If you don't have the document # you can request a Title Search.
- e) Date of Lien – List the date the lien was prepared.
- f) Recorded Lien Date: When a lien is recorded the County will list the date the lien was recorded.

## **Lien Satisfaction - Continued**

- g) Amount Paid: Enter the dollar amount you have been paid.
- h) Balance Due: Enter the dollar amount you are due.
- i) Name of authorized person who will sign the lien satisfaction: (Note: An authorized person should be the business owner or officer of the Company)
- j) Title: List the business title of the person signing the document.
- k) Please return by: Pull down tab – Fax, Mail or Email
- l) Add Files - Select parties to email Satisfaction
- m) Download – To preview the document prior to submitting the document, select Download  
The file will be downloaded to your computer, which you can save or print the Satisfaction.
- n) Submit Request.

**Pre-lien, Intent to Lien, Lien, Bond** – A **prelien** is required by law for most residential projects, before a lien can be filed. A prelien should be sent when the contract is entered into or when the job is started. The **Intent to Lien** can be sent to the property owner requesting payment within 10 days or a lien will be filed. A **lien** should be filed within 120 days of the last date of work. A **bond claim** is filed against a government publically owned property.

- a) Select Services tab – Pull down tab - Select Required Form – Prelien, Intent, Lien or Bond
- b) Complete project information: Project Address, City, Start Date, Last Date, Type of Work, Who Hired You, Project Estimate, Balance Due. Other information is optional, Legal description, PIN #
- c) Please return by. Pull down tab – Fax, Mail or Email
- d) Add Files – If you want a copy of your estimate or invoice sent with the document attach the file.  
A link will open up a directory to your computer files to attach one or more documents.
- e) Download – If the job information has been entered previously the document can be downloaded.
- f) Check parties document should be sent to.
- g) Submit Request – The request is sent to CMM. The document will be prepared and sent to the property owner by certified mail. A copy will be sent to requesting party.

**Lien Waiver** – When payment is made a partial or full and final lien waiver should be sent to the payor.

- a) Select Services tab – Pull down tab – Select Lien Waiver
- b) Complete project information: Project Address, City, Amount Paid, Balance Due, Name of person signing lien waiver, title of person signing document. Other information is optional.
- c) Please return by. Pull down tab – Fax, Mail or Email
- d) Add Files – If you want a copy of your invoice sent with the document attach the file.
- e) Download – If job information has been entered previously document can be downloaded, saved and be printed.
- f) Check parties you want document sent to.
- g) Submit Request – The request is sent to CMM. The document will be prepared and sent to the parties listed. The document will be sent to requesting party.

**Title Search** – Provides a report identifying the property owner name(s), legal description, mortgages, liens and history of records filed against the property.

- a) Select Services tab – Pull down tab – Select Title Search
- b) Complete project information: Project Address, City
- c) Indicate if you want the title search with or without copies of the property title documents.
- d) Please return by: Select pull down tab – Fax, Mail or E-mail.
- e) Add files – If property involves several parcels or meets and bound legal description you can attach a file to your request.
- f) Submit Request - The property is researched and the report is sent to the requesting party.

**9. Referrals** - If you would like to solicit more work add your business name to the CMM network. Users can obtain a report listing contractors, subcontractors or suppliers by Name, Trade or City.

- a) Select tab – Referral (Top middle part of screen)
- b) Complete information: Business name, Address, City, State, Zip, Phone #, Email
- c) Business Type: Select from pull down tab: Bank, Insurance Co, Contractor, Sub-contractor, Supplier, Title Company, Other
- d) Business Sub Type – Select from pull down tab: Title Co, Appraisal, Architect, Attorney, General Contractor, Material Supplier, Sub-contractor.
- e) Join Referral Program

**10. Solutions** – Provides a computer link to other important web sites.

- a) Select tab – Solutions (Top middle side of screen)
- b) Select the business or government link to their web site.

**11. Search** – Look up project information by address, street name, city, county or state.

- a) Select tab – Search (Top right side of screen)
- b) Enter Project Address and or street name, City, State, Zip, County (Example: 12345)
- c) Search Results – gives you a listing of projects that include the address information requested.
- d) Select the project address for which you want to Edit or add a NOF.
- e) Requestor can only Edit, or obtain a Completion Report or Full Disclosure for projects they are listed as the General Contractor, to maintain confidentiality.
- f) Requestor can add a NOF - Notice of Furnishing to the selected project address. (Go to Step # 5)

**12. Pricing** – A complete list of our services and pricing can be viewed.

- a) Select tab – (Top right side of screen)

Feel free to call or email us with ANY questions. We want your experience using our web site to be user friendly, providing valuable and timely information.

**Construction Money Management, LLC**

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