



BuilderTek User Guide

Version 1.0

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BuilderTek User Modules Guide

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What's in this Guide?

Construction Modules

BuilderTek contains over 100 modules for a variety of uses, including sales, budgeting, human resources, vendor and product management, invoicing, and many more.

This guide focuses on the following modules in the Construction app:

- **Pre-Qual** (pre-qualifying vendors)
- **RFQs** (Requests for Quote)
- **RFIs** (Requests for Information)
- **SOVs** (Statements of Values)
- **Payment Applications**

BuilderTek contains over
100 modules!

What do those colors mean?

Prerequisites

Text with an **orange** background represents actions that come *before* a procedure.

My Optional Steps

Text with a **green** background represents optional actions that you as a BuilderTek customer can take.

Vendor / Customer Actions

Text with a **blue** background represents the “behind-the-scenes” actions of another party, such as a vendor or customer. (You as a BuilderTek customer don't do these things.)

Next Steps

Text with a **violet** background represents potential actions that may come *after* a procedure.

Pre-Qualification



Pre-qualification is found in the **Accounts** module.

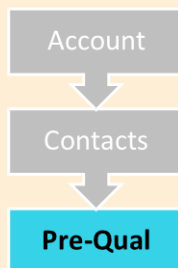
Initiating vendor pre-qualification consists of emailing a request to the vendor to fill out an attached form. After the form is filled out and returned by the vendor, you can then qualify the vendor by executing the contract. At that point, the vendor is pre-qualified, meaning your company deems them to possess the capacity, capability, and experience to fulfill a work order.

During the pre-qualification process, you collect information about the vendor, such as the following:

- Contact information
- Officers' names
- Master Business License Number
- Retail Sales Tax Number

Prerequisites

Before starting the pre-qualification process, make sure you have set up the following:



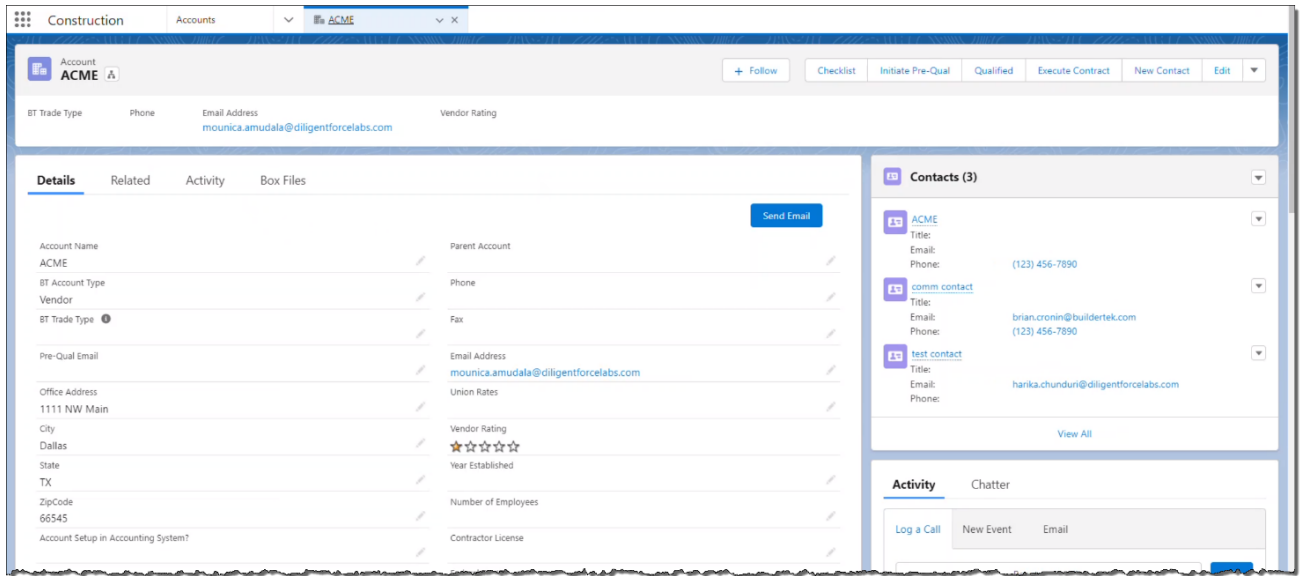
Pre-Qualification Process



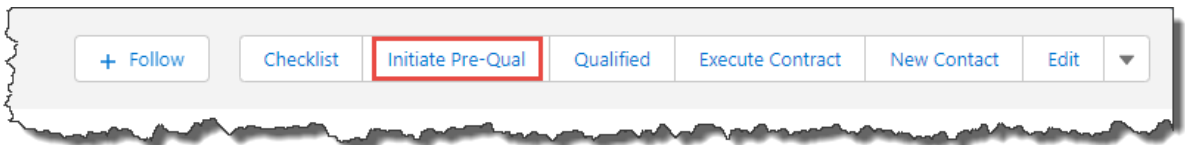
Pre-Qualify a Vendor

Initiate Pre-Qualification

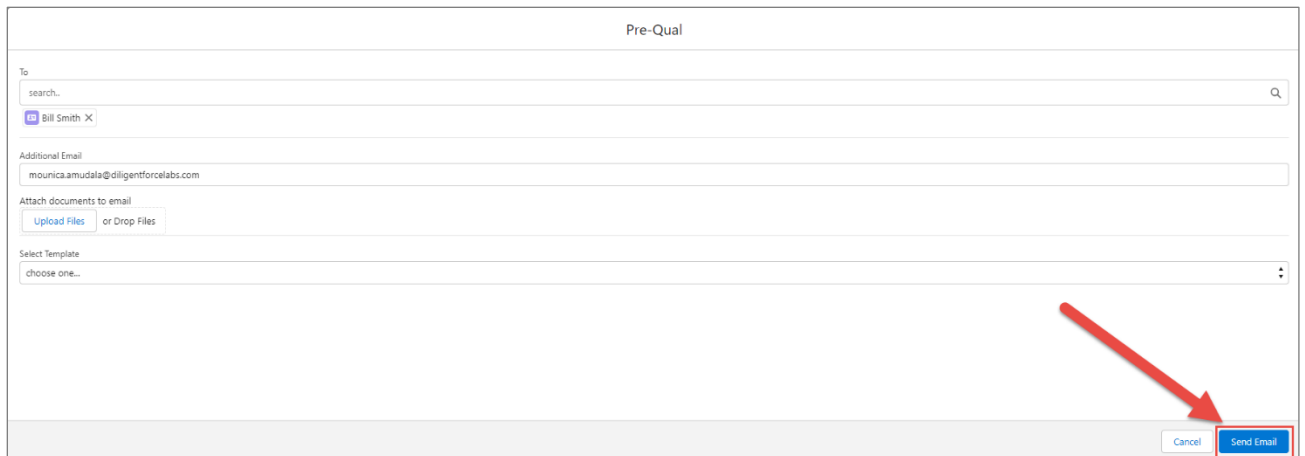
1. Open the *Accounts* page and find the vendor you want to pre-qualify.



2. Click the **Initiate Pre-Qual** button.



The *Pre-Qual* dialog box opens:



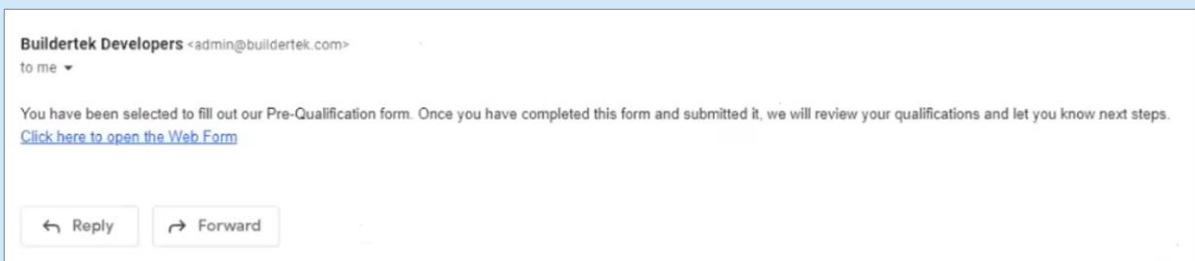
- By default, the Pre-Qual dialog box is populated with the Primary Contact for the account. To add other account contacts as recipients, begin entering their name in the *To* field, then select their name when it appears, or enter one or more email addresses in *Additional Email* for people who are not set up as contacts.
- You can attach documents to the email by clicking **Upload Files** and selecting the files.

3. Click **Send Email**.

Vendor Response

On the vendor's side...

The vendor receives an email stating that they have been selected to fill out a pre-qual form:



The vendor must fill out the form, sign it, and click **Submit**.



The screenshot shows a digital signature form. At the top left, it says "Signature". Below this is a large rectangular box containing a handwritten signature in black ink. To the right of the signature box is a small blue link that says "Clear Signature". Below the signature box, there is a line of text: "Employers are required to submit the completed form to the constructor for posting/display at the project." At the bottom right of the form, there are two buttons: "Cancel" and "Submit". The "Submit" button is highlighted with a red rectangular border.

Once the vendor has submitted the form, their vendor details appear in the vendor account:

Vendor Details - 1000				
Nature of Business	Partnership		Signed Date	10/03/2022
Average # of Employees on Job	50+			
Officers Name	Brian Cronin		Officers (2) Name	
Officers Title	President		Officers (2) Title	
Officers Date Appointed	29/12/2021		Officers Date (2) Appointed	

4. Review the vendor details, then click **Qualified**.



A confirmation appears:

Qualified

Do you want to change the Qualification Stage to Qualified?

Note : Please attach documentation here.

or Drop Files

- If you need to add documentation as justification for changing the status to Qualified, click **Upload Files** and select one or more files, or select the files and drag them into the dialog box.

5. Click **Yes**.

A contract document is sent to the vendor.

On the vendor's side...

The vendor receives a contract document:

Scope of Work
GENERAL CONDITIONS-ALL PROJECTS

1. DEFINITIONS AND INTERPRETATIONS
The term **SPL** refers to Sifton Properties Limited.
The term **Site Superintendent /Site Foreman** refers to the SPL representative assigned to manage the jobsite.
The term **Subtrade** refers to a subcontractor or supplier contracted by SPL to perform work or supply materials on their jobsites. It also refers to any employees or representatives of the subcontractor or supplier.
The term **Contract** refers to the construction documents which form the contract including General Conditions of SPL, the Tender Drawings and the Scopes of Work. Terms or Conditions submitted by the Subtrade with the tender price will not override those of the tender documents.
When discrepancies exist between The Scopes of Work and the drawings, always seek clarification from the Site Superintendent or Site Foreman.

2. CONDUCT, STANDARDS AND CODES
Hours of work are between 7:00 am and 6:00 pm Monday to Friday. Contact your Superintendent for any special arrangements.
Subtrades shall conduct themselves in a professional and courteous fashion at all times while on SPL jobsites. Unprofessional behavior including foul language will not be tolerated, and could result in immediate eviction at the discretion of the Site Superintendent.
Smoking is not permitted in any SPL homes under construction.
It is the Subtrade's responsibility to adhere to the schedule established by the Superintendent. The Subtrade must notify the Superintendent prior to commencement of work if a job cannot be started or completed on the scheduled date(s). The Superintendent is at liberty to cancel and reschedule the Subtrade for a later date when work can be completed in its entirety.
A new set of plans is required for each house. Plans are subject to changes and modifications. At the start of each job, check in with the Site Superintendent to review any changes that may affect the work. Plans should be picked up at the job trailer from the Site Superintendent. If the Subtrade notices any existing condition that could cause their work to be deficient, it is their responsibility to notify the Site Superintendent immediately.
DO NOT WORK FROM STANDARD PLANS. ALWAYS USE LOT SPECIFIC PLANS THAT WILL BE PROVIDED ON SITE. SUBTRADES SHOULD ALWAYS HAVE PLANS ON SITE WHEN PERFORMING WORK. IT IS THE RESPONSIBILITY OF THE SUBTRADES TO SEND ALL INFORMATION ON PURCHASE ORDERS TO SITE WITH THEIR EMPLOYEES. IT IS THE RESPONSIBILITY OF THE SUBTRADE TO REVIEW LOT SPECIFIC SPECIFICATION BINDERS.


The vendor must fill out the form, sign it, then click **Submit**.

Agent for

have read and fully understand the above **Scope of Work** and I hereby agree to perform all work in accordance with the above.

Date

Subtrade (or agent)

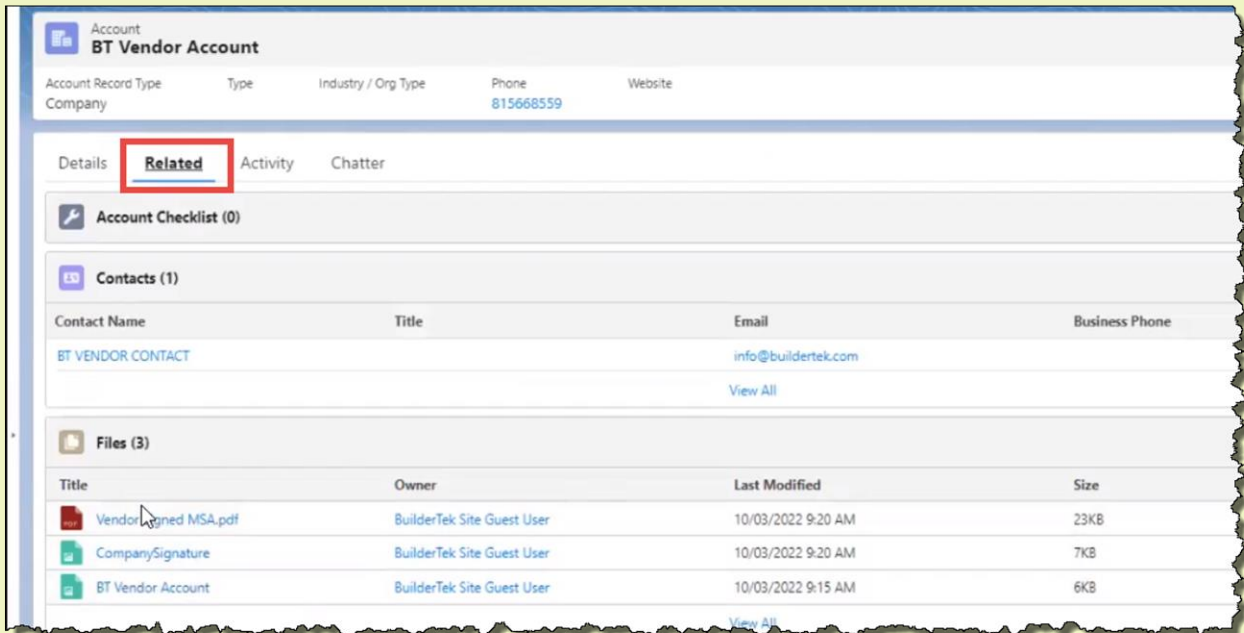


[Clear Signature](#)

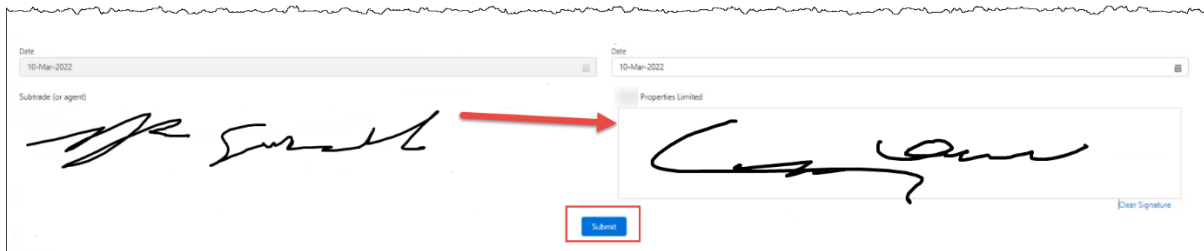
Execute the MSA

Review the document signed by the vendor...

If you want to the documents that the vendor has sent, open the *Related* tab:



6. Review the contract document, sign it, then click **Submit**.



Reminder: This is the (final) internal counter-signature to the document that was signed and returned by the vendor.

7. Click **Execute GCA**.

Both parties receive copies of the signed contract. The vendor is now fully pre-qualified to work with you and will show up in downstream processes, such as [Requests for Quote \(RFQ\)](#).

After Pre-Qualification

After Pre-Qual

You might ask the vendor to submit a [request for quote \(RFQ\)](#) in order to make a bid on work or materials.

RFQ (Request for Quotes)

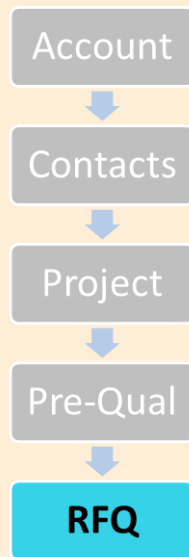


RFQs are located in the **Projects** module.

Request for Quote (RFQ) is the process used to gather vendor pricing for materials and labor. RFQs can be directly related to an Opportunity or saved in the PriceBook for future use.

Prerequisites

Before you can send a request for quotes, you must have the following:



RFQ Cycle

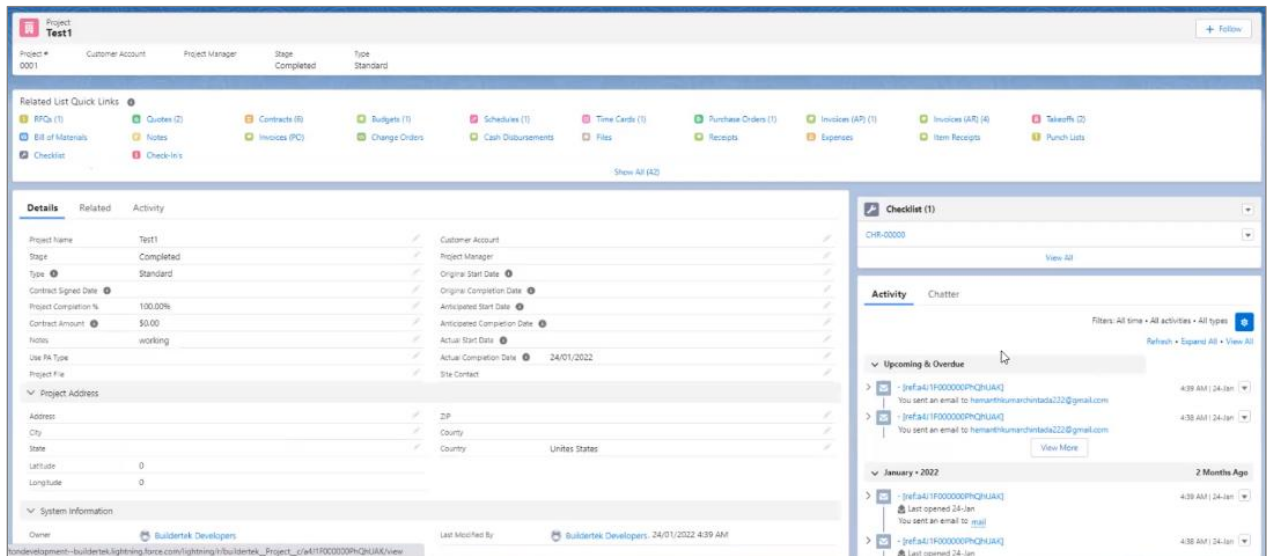
If a vendor doesn't already have contractual pricing set up, they must go through the RFQ cycle. This can be for a single project or for a Master RFQ.



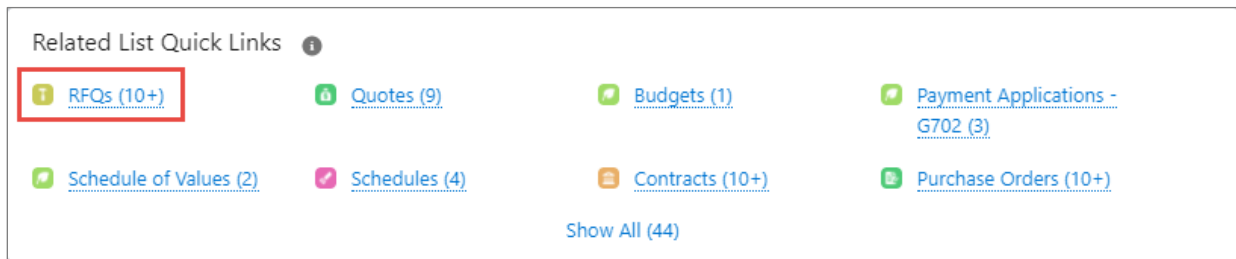
Create a New RFQ

Enter RFQ Details

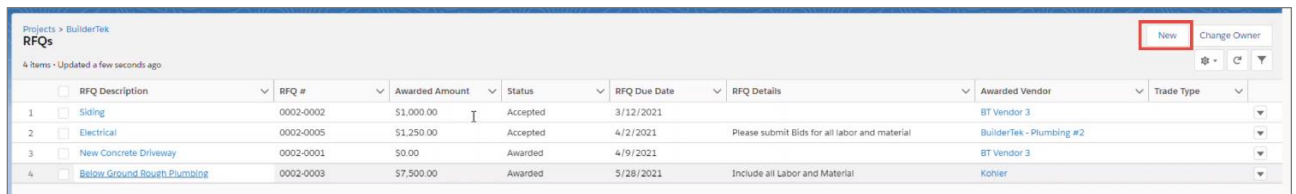
1. Open a project.



2. Click the **RFQs** icon in the *Quick Links* section.



The RFQ page opens:

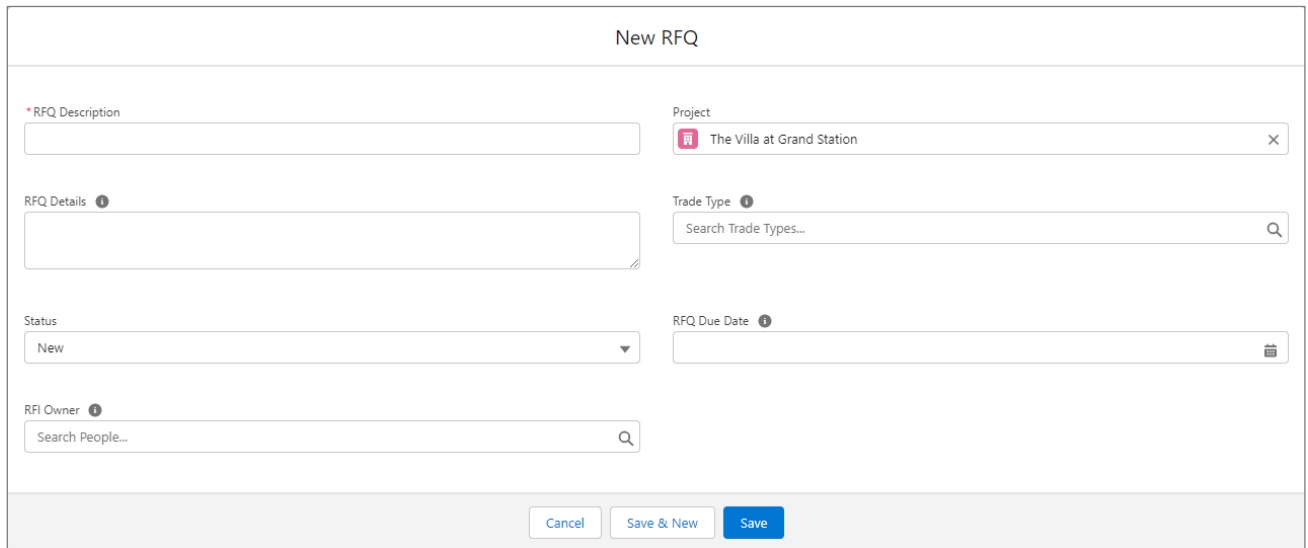


The screenshot shows the 'RFQs' page with a table of 4 items. The 'New' button is highlighted with a red box.

RFQ Description	RFQ #	Awarded Amount	Status	RFQ Due Date	RFQ Details	Awarded Vendor	Trade Type
1 Sidling	0002-0002	\$1,000.00	Accepted	3/12/2021		BT Vendor 3	
2 Electrical	0002-0005	\$1,250.00	Accepted	4/2/2021	Please submit Bids for all labor and material	BuilderTek - Plumbing #2	
3 New Concrete Driveway	0002-0001	50.00	Awarded	4/9/2021		BT Vendor 3	
4 Below Ground Rough Plumbing	0002-0003	57,500.00	Awarded	5/28/2021	Include all Labor and Material	Kohier	

3. Click **New**.

The *New RFQ* dialog opens.

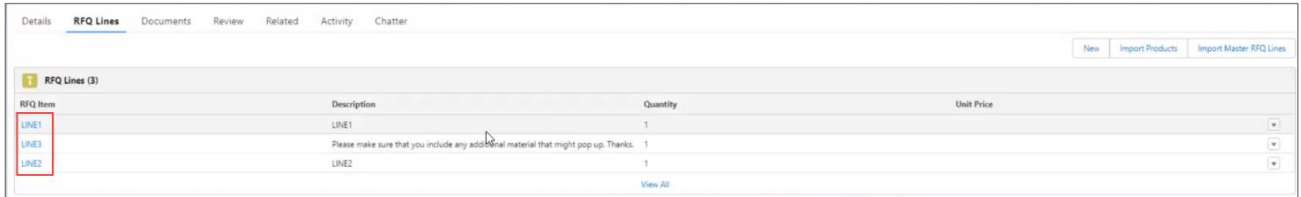


4. Enter all the information, then click **Save**.

- **RFQ Description** (mandatory)—enter a description of the RFQ. (This is intended to be useful for *your* company.)
- **RFQ Details**—enter any important details about the RFQ that may be helpful to the vendor.
- **Status**—displays the status *New* by default.
- **RFI Owner**—select the name of the person at your company who will be responsible for responding to an RFI, should one come from the vendor. (See [RFIs \(Requests for Information\)](#).)
- **Project**—displays the name of the current project by default.
- **Trade Type**—select or enter the type of trade the vendor or supplier specializes in. (If necessary, you can create a new trade type by searching on the new trade name, clicking on **Show All Results for “[trade name]”**, then clicking on **+ New Trade Type** and following the onscreen directions.)
- **RFQ Due Date**—enter a date or select one from the calendar.

Create RFQ Lines

If necessary, you can create additional RFQ lines. If you aren't using a Master RFQ to import line items for the request, you can enter each line for materials and/or labor pricing requested manually.

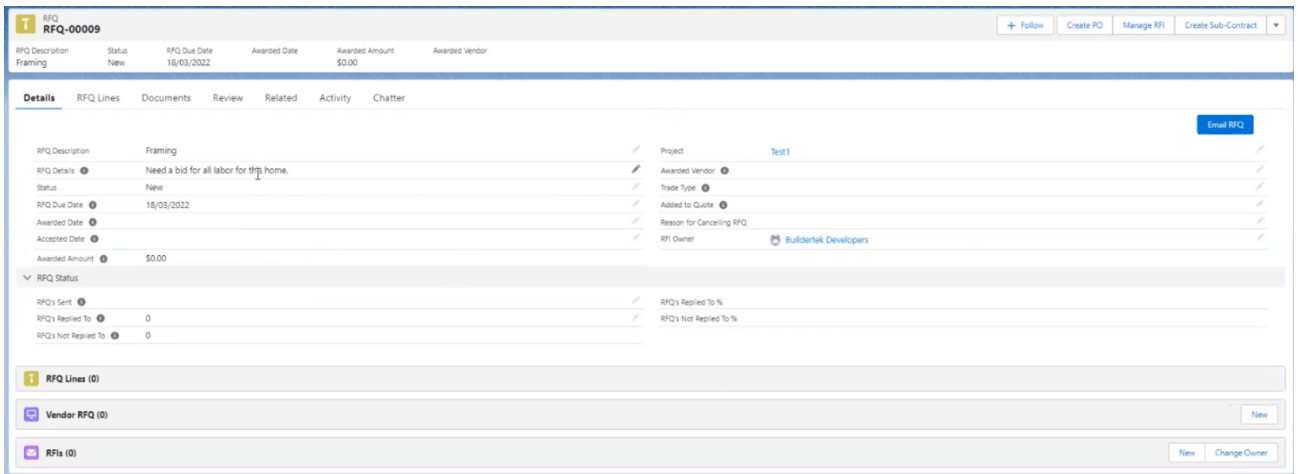


RFQ Item	Description	Quantity	Unit Price
LINE1		1	
LINE3	Please make sure that you include any additional material that might pop up. Thanks.	1	
LINE2		1	

- To create a new line, finish filling out the previous line, then click **Save and New**.

5. Click **Save** to complete the RFQ lines.

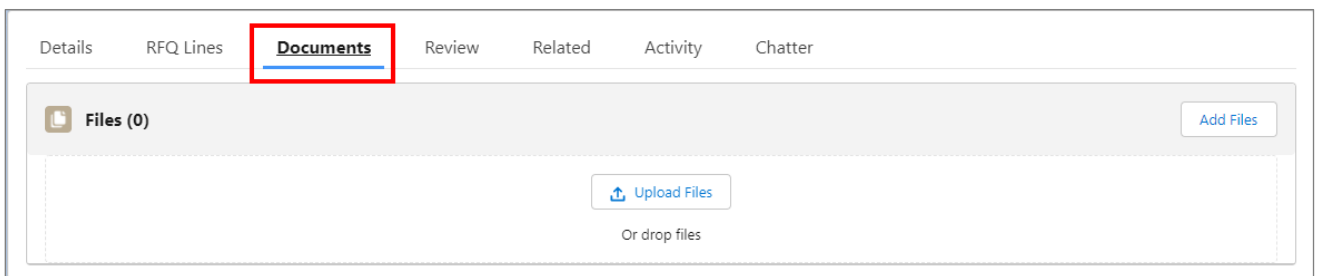
The new RFQ opens in a tab:



Add Documents

If necessary, you can add documents that may be important for the bidder to the RFQ—this could be plans, blueprints, material specs, or similar files.

To add documents, click the **Documents** tab.



- **Add Files**—click then locate and open files that have previously been uploaded.
- **Upload Files**—click and locate files and open them, or simply drag them from your computer into the *Files* pane.

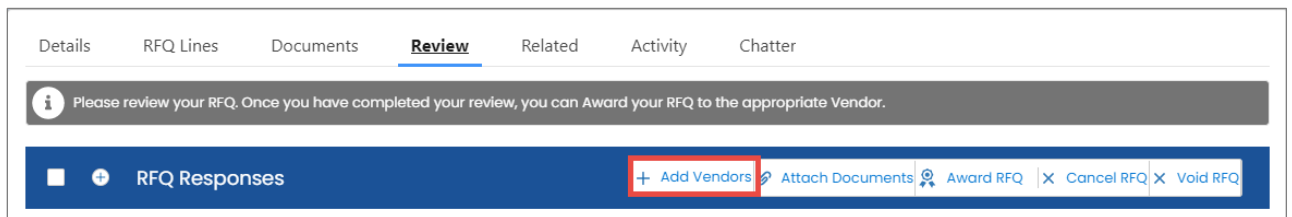
Review (Select Vendors)

Note: By default, only pre-qualified vendors appear for selection.

Need to allow non pre-qualified vendors?

If you want to include non-qualified vendors, go to the *RFQ Administration* section and uncheck the **Only display pre-qualified vendors** option.

6. Open the *Review* tab.




7. Click **+ Add Vendors**.

The *Add Vendors* dialog opens.

Add Vendors

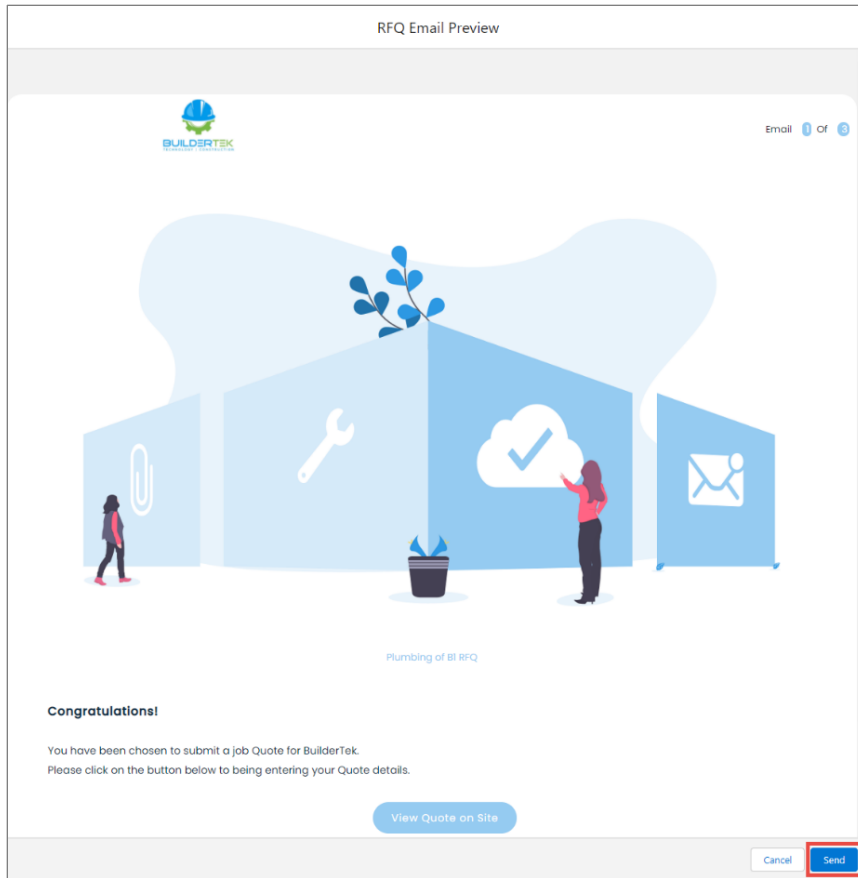
Name	Trade Type	Insurance
<input type="checkbox"/> ZEROEZ KANSAS CITY	Cabinets	
<input type="checkbox"/> Bob Smith	Concrete	
<input type="checkbox"/> Professional Concrete	Concrete	
<input type="checkbox"/> TH Technologies	Electrical	
<input type="checkbox"/> ABC Services	Electrical	
<input type="checkbox"/> Ace Framing	Framing	
<input type="checkbox"/> Greenland Landscaping	Landscaping	
<input checked="" type="checkbox"/> BuilderTek	Landscaping	
<input type="checkbox"/> Payer Compass	Low Voltage	
<input type="checkbox"/> Bob Smith	Plumbing	
<input type="checkbox"/> Mobile2	Roofing	

8. Check the name(s) of the vendor(s) you want to send to, then click **Add Vendors**.
9. Click the  icon to expand the *RFQ Responses* section.

RFQ Responses							
TEER VENDOR - TEER VENDOR CONTACT + New							
TEER VENDOR	Item Name	Description	Vendor Notes	Quantity	Unit Price	USD 0.00	
	LINE1	LINE1		1		USD 0.00	
	LINE2	LINE2		1		USD 0.00	
	LINE3	Please make sure that you include any additional material that might pop up. Thanks.		1		USD 0.00	
						Total: USD 0.00	
ACME - ACME VENDOR CONTACT + New							
ACME	Item Name	Description	Vendor Notes	Quantity	Unit Price	USD 0.00	
	LINE1	LINE1		1		USD 0.00	
	LINE2	LINE2		1		USD 0.00	
	LINE3	Please make sure that you include any additional material that might pop up. Thanks.		1		USD 0.00	
						Total: USD 0.00	

10. Check the name of one or more vendors, then click **Email Vendors**.

+ Add Vendors
✉ Email Vendors
☰ Level RFQ's
📎 Attach Documents
👤 Award RFQ
🗑 Delete Vendors
✕ Cancel RFQ
✕ Void RFQ

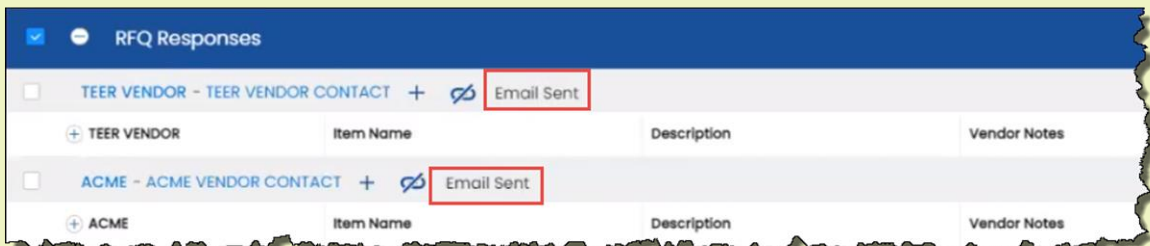


11. Click **Send**.

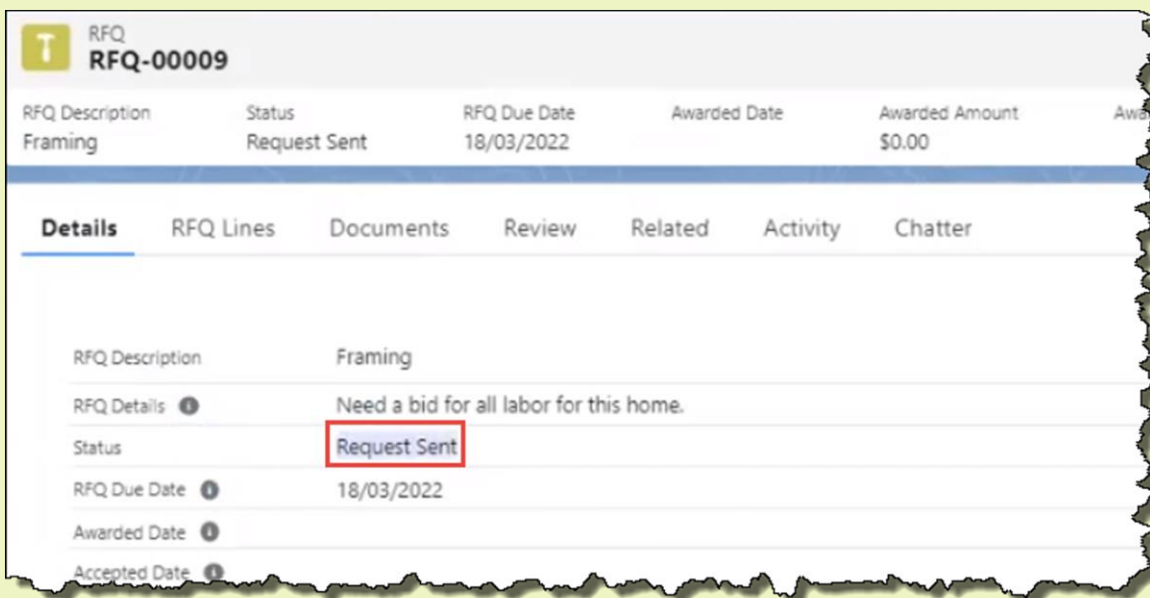
Verify that the emails have been sent...

If you want to verify that the emails have been sent, you can do so in the following places:

In the *RFQ Responses* section:



In the *Details* tab:



On the vendor's side...

The vendor receives an email, fills out the form with their bid, then submits their bid. (They can come back to view their submission at any time, but cannot re-submit their bid.)

12. Go to *Review* to view their bids.
 - You can select multiple bids to compare them.

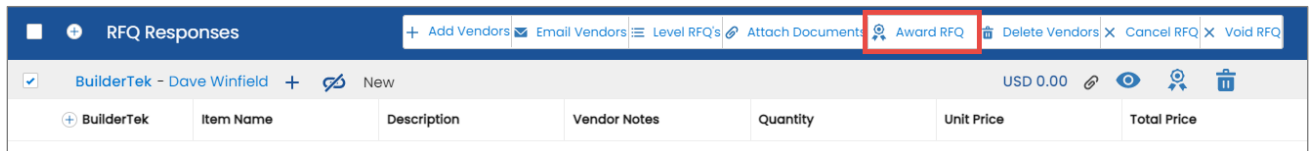
On the vendor's side...

Does your vendor have questions?

Refer them to the [RFI \(Request for Information\) function](#).

Award the RFQ

13. Check the desired vendor and click **Award RFQ**.



The screenshot shows the 'RFQ Responses' interface. The top navigation bar includes buttons for '+ Add Vendors', 'Email Vendors', 'Level RFQ's', 'Attach Documents', 'Award RFQ' (highlighted with a red box), 'Delete Vendors', 'Cancel RFQ', and 'Void RFQ'. Below the navigation bar, there is a header for 'BuilderTek - Dave Winfield' and a 'New' button. The main area contains a table with the following columns: 'BuilderTek', 'Item Name', 'Description', 'Vendor Notes', 'Quantity', 'Unit Price', and 'Total Price'. The 'Unit Price' column shows 'USD 0.00'.

Verify that the RFQ has been awarded...

If you want to verify that the RFQ has been awarded, you can do so in the following places:

In the *RFQ Responses* section:

RFQ Responses			
TEER VENDOR - TEER VENDOR CONTACT + Awarded			
TEER VENDOR	Item Name	Description	Vendor Notes
	LINE1	LINE1	
	LINE2	LINE2	
		Please make sure that you include any	

In the *Details* section:

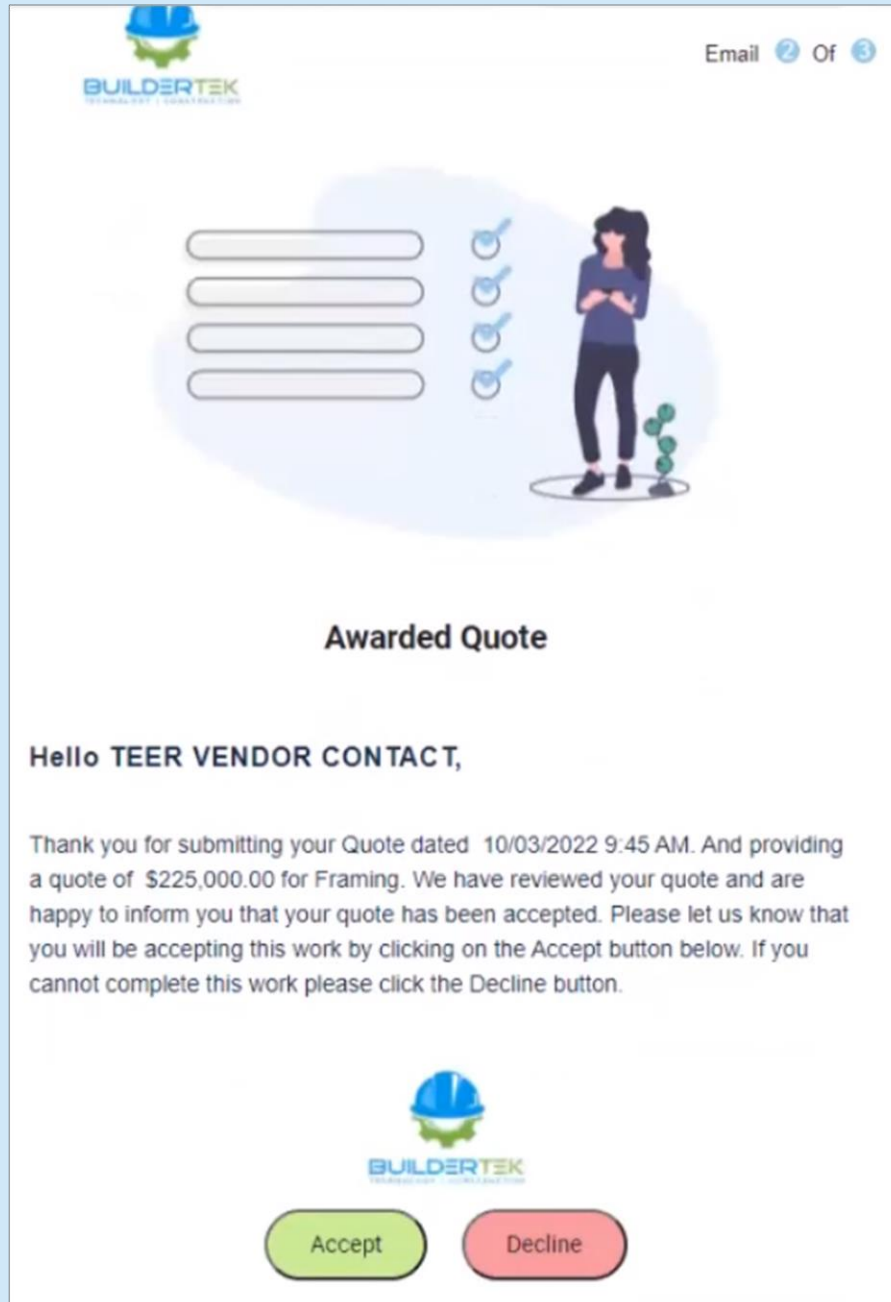
Details	RFQ Lines	Documents	Review	Related	Activity	Chatter
RFQ Description	Framing					
RFQ Details	Need a bid for all labor for this home.					
Status	Awarded					
RFQ Due Date	18/03/2022					
Awarded Date	10/03/2022					
Accepted Date						
Awarded Amount	\$225,000.00					
▼ RFQ Status						
RFQ's Sent	2					
RFQ's Replied To	3					
RFQ's Not Replied To	-1					

And if you look at the vendor who was awarded:

Vendor RFQ (2)				
2 Items • Updated a few seconds ago				
<input type="checkbox"/>	Account	Open RFI's	Status	Quote Amount
1	<input type="checkbox"/> TEER VENDOR	0	Accepted	\$225,000.00
2	<input type="checkbox"/> ACME	0	Email Sent	\$0.00

On the vendor's side...

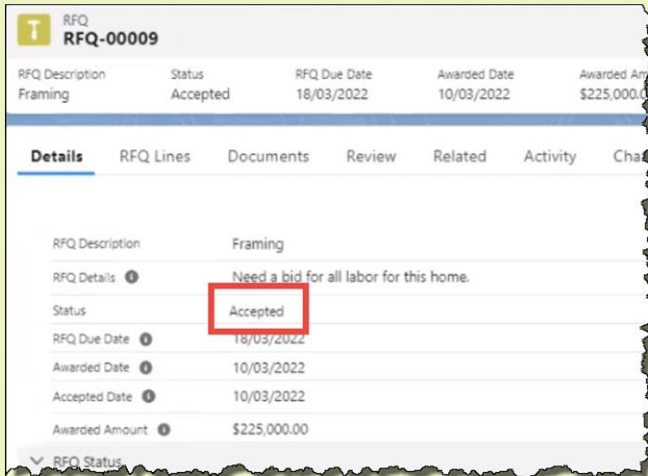
The vendor receives an email stating that they have been awarded the contract:



The vendor must click **Accept** in the email to confirm that they want to accept the job.

Verify that the RFQ has been accepted...

Once the vendor accepts the job, it appears as *Accepted* in the project *Details* section:



RFQ-00009

RFQ Description	Status	RFQ Due Date	Awarded Date	Awarded Amount
Framing	Accepted	18/03/2022	10/03/2022	\$225,000.00

Details RFQ Lines Documents Review Related Activity Chatter

RFQ Description: Framing

RFQ Details: Need a bid for all labor for this home.

Status: **Accepted**

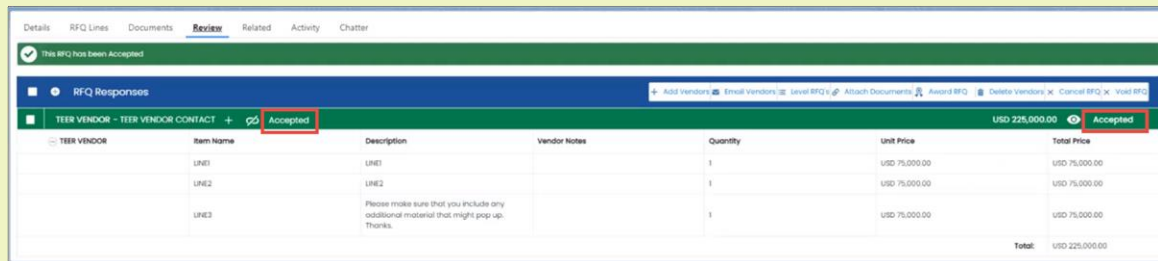
RFQ Due Date: 18/03/2022

Awarded Date: 10/03/2022

Accepted Date: 10/03/2022

Awarded Amount: \$225,000.00

In the *Review* section:



Details RFQ Lines Documents **Review** Related Activity Chatter

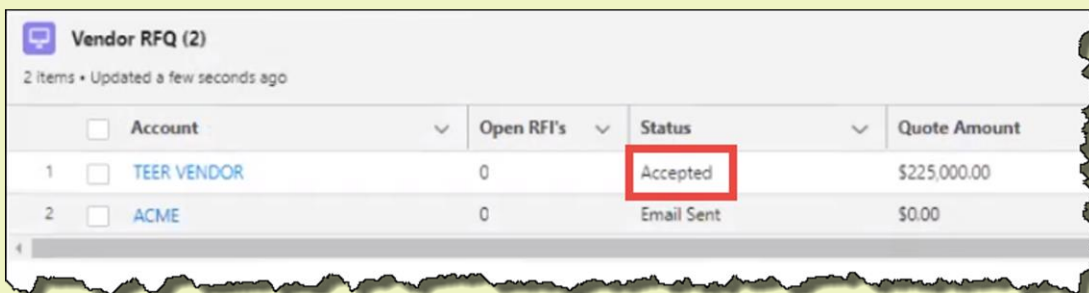
This RFQ has been Accepted

RFQ Responses

TEER VENDOR - TEER VENDOR CONTACT + **Accepted** USD 225,000.00 **Accepted**

Item Name	Description	Quantity	Unit Price	Total Price
LINE1		1	USD 75,000.00	USD 75,000.00
LINE2		1	USD 75,000.00	USD 75,000.00
LINE3	Please make sure that you include any additional material that might pop-up. Thanks.	1	USD 75,000.00	USD 75,000.00
Total:				USD 225,000.00

Under *Vendor*:



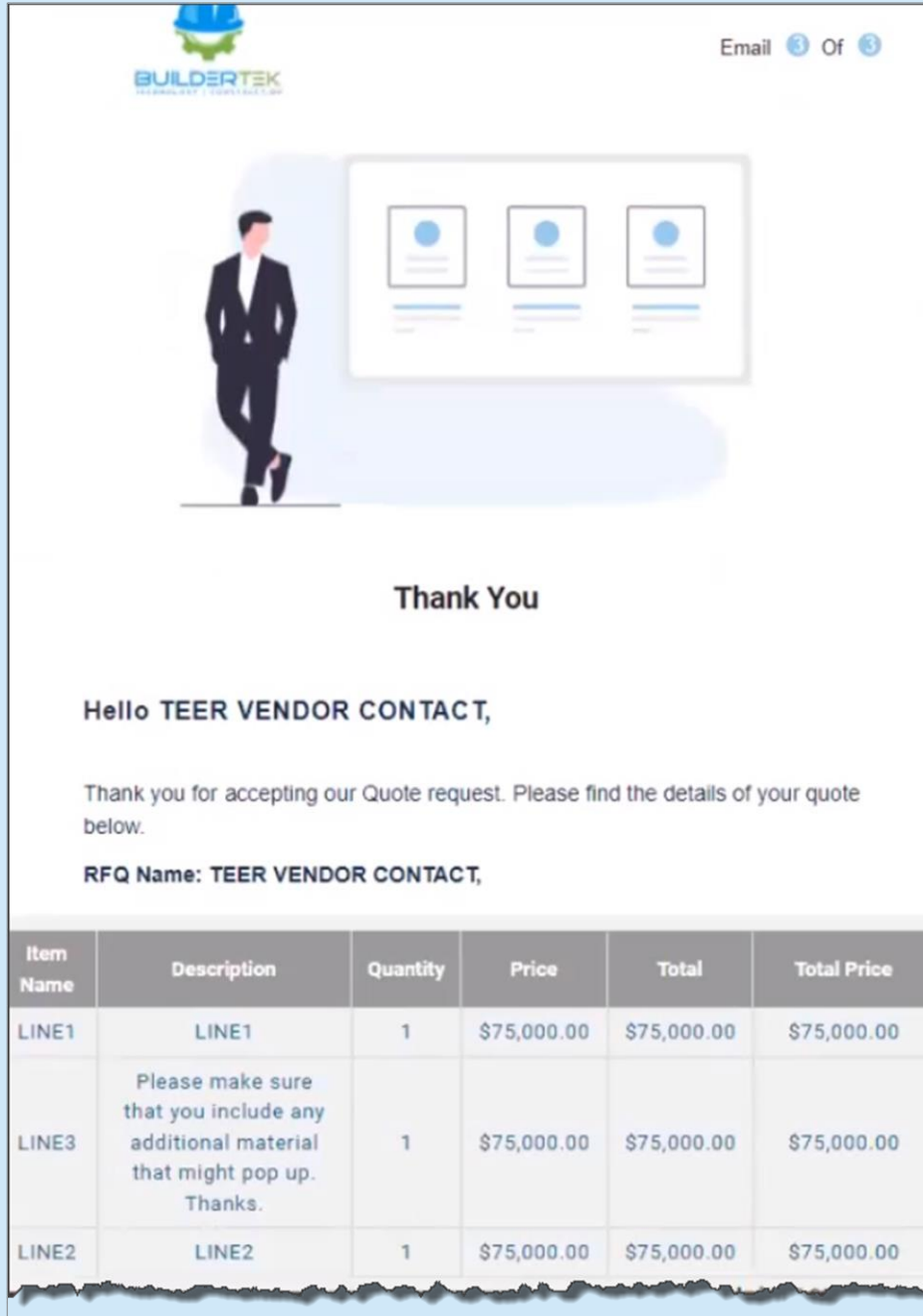
Vendor RFQ (2)

2 items • Updated a few seconds ago

Account	Open RFI's	Status	Quote Amount
1 <input type="checkbox"/> TEER VENDOR	0	Accepted	\$225,000.00
2 <input type="checkbox"/> ACME	0	Email Sent	\$0.00

On the vendor's side...

The vendor also receives an email with details of their quote:

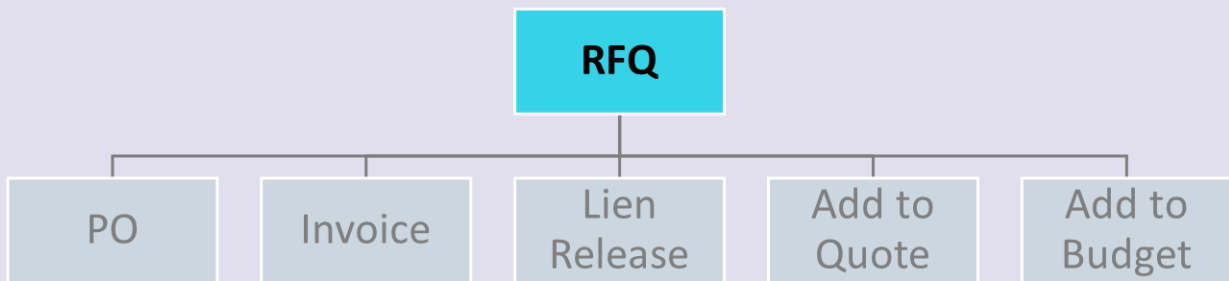


The RFQ process is finished.

After the RFQ

After RFQ...

Once the RFQ process is successfully completed, you may wish to create a purchase order (PO), generate invoices, or perform other tasks.



RFI (Request for Information)



RFIs are located in the **Projects** tab.

BuilderTek's Request for Information (RFI) process allows vendors and customers to ask questions through the BuilderTek platform. This allows you to easily track and manage these interactions. While RFIs can be tied to an RFQ, providing a convenient way to control bidding interactions, RFIs can also be leveraged throughout the project lifecycle.

RFI Flow

The vendor or customer submits an RFI and the company reviews and responds. (Some organizations assign a specific employee to this role.) When the initiator is satisfied, either party can close the RFI.



Create an RFI

On the vendor's side...

Vendors create RFIs from inside BuilderTek's Communities.

Respond to an RFI

Once you receive an RFI from a vendor, you can respond to it to answer the vendor's questions.

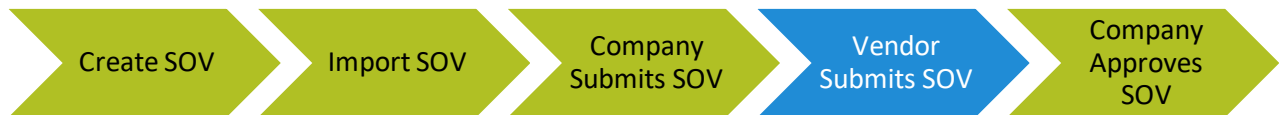
SOV (Schedule of Values)



RFIs are located in the **Projects** tab.

A Schedule of Values is an industry standard approach allowing you to structure progress payments with your vendors and/or customers. Using an SOV, you can structure expected progress and payments for labor and materials in a step-by-step manner and update progress on a percentage basis.

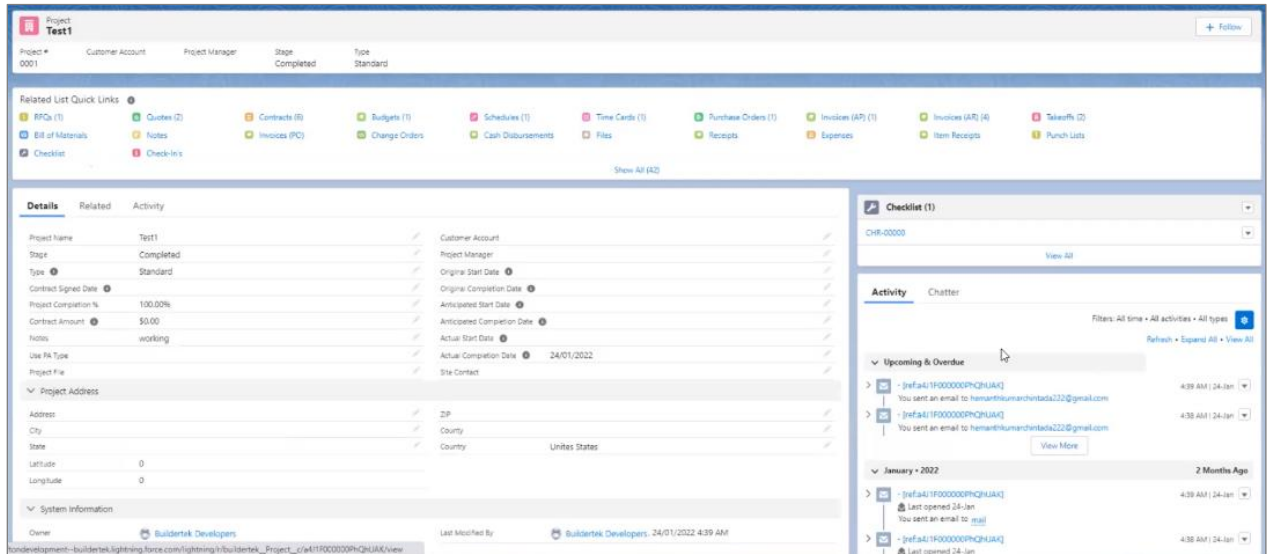
SOV Flow



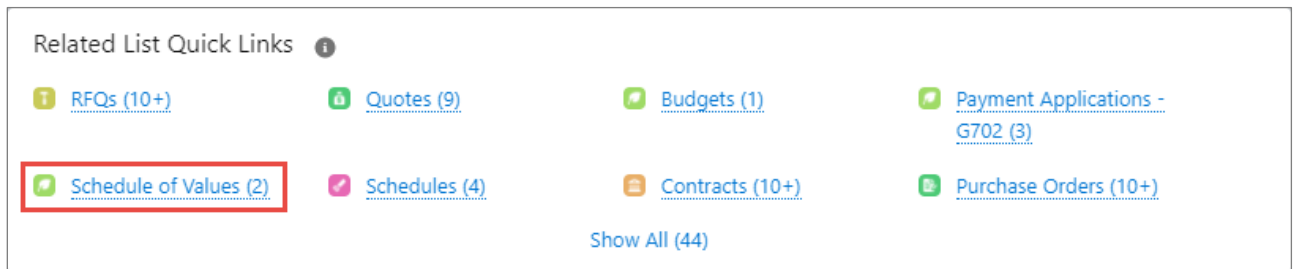
Vendor SOV

Create a Vendor SOV

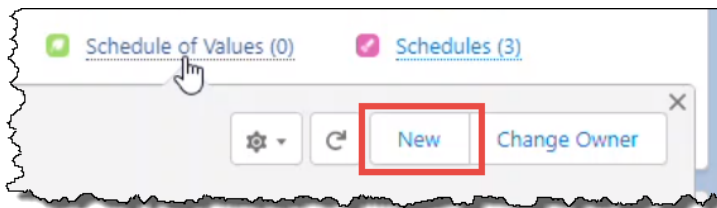
1. Open a project.



2. Click the **Schedule of Values** icon in Quick Links.

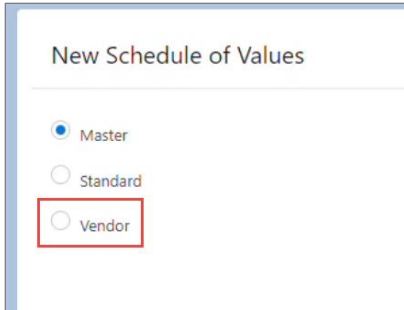


A drop-down panel opens, displaying a number of options:



3. Click **New**.

The New Schedule of Values window opens:

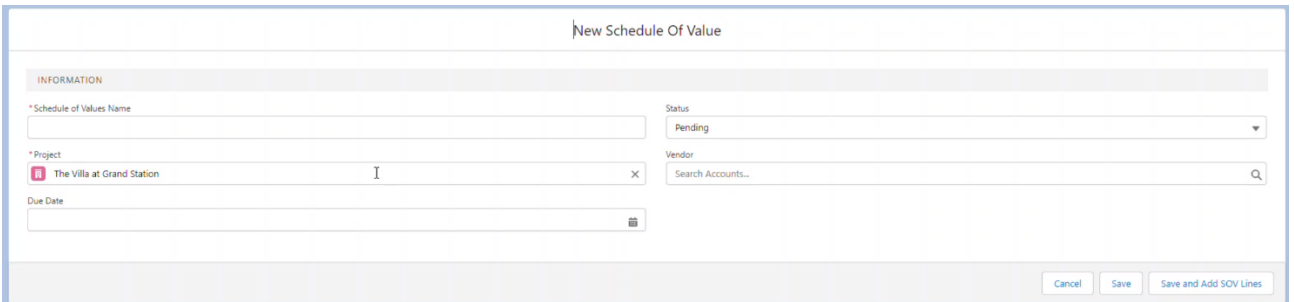


New Schedule of Values

Master
 Standard
 Vendor

4. Select the **Vendor** option, then click **Next**.
 - **Master**—select this option to create an SOV template.
 - **Standard**—select this option to create a [Standard SOV](#) that includes all costs (including vendor costs).
 - **Vendor**—select this option to create a Vendor SOV.

The Information window opens:



New Schedule Of Value

INFORMATION

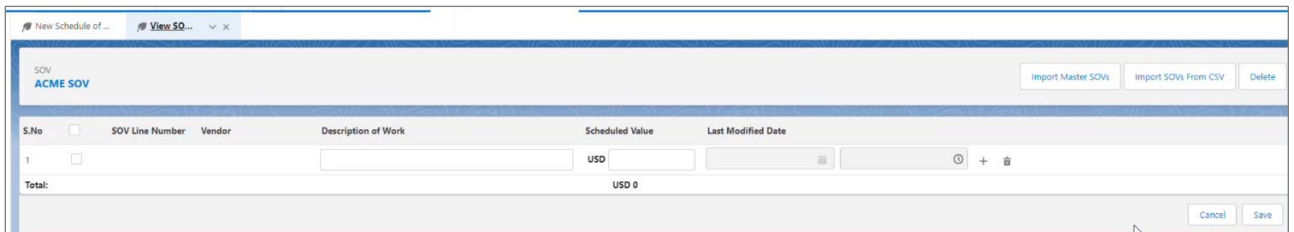
* Schedule of Values Name Status

* Project Vendor

Due Date

Cancel Save Save and Add SOV Lines

- **Schedule of Values Name (mandatory)**—enter a name
 - **Project**—the current project appears by default; you can select a different project if required.
 - **Due Date**—click on the calendar to select a due date.
 - **Status**—the *Pending* status appears by default; you can select a different status if required.
 - **Vendor**—select the name of the vendor that you want to start submitting SoVs.
5. Click **Save and Add SOV Lines**.



New Schedule of ... View SOV

SOV ACME SOV

S.No	SOV Line Number	Vendor	Description of Work	Scheduled Value	Last Modified Date
1				USD 0	

Total: USD 0

Cancel Save

6. Continue to add SOV lines as necessary, then click **Save**.

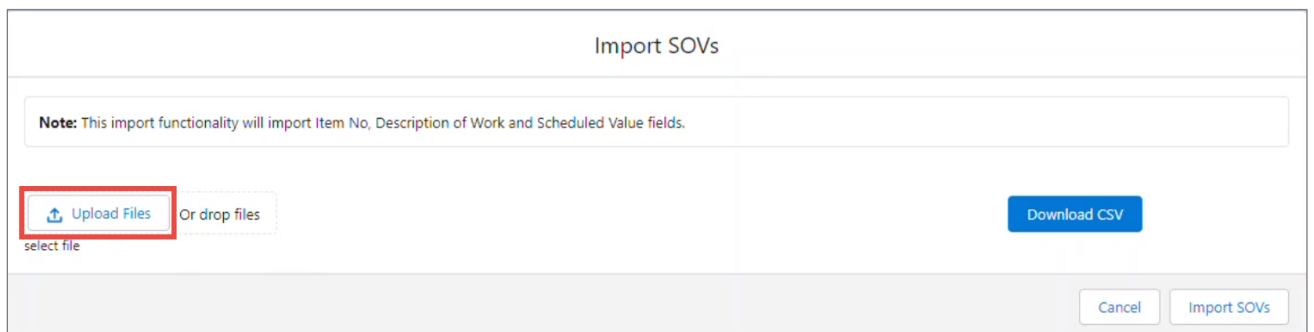
Import a Vendor SOV

You can import a master SOV from a CSV file.

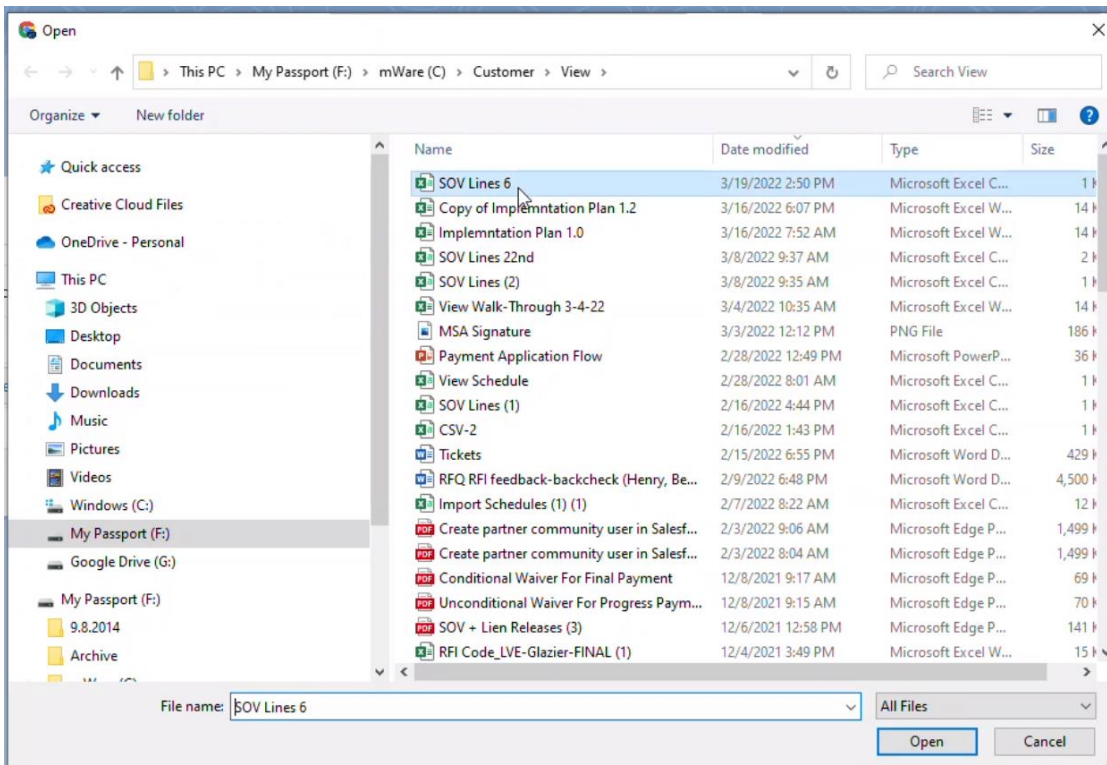


7. Click **Import an SOV from a CSV File**.

The Import SOVs dialog opens:

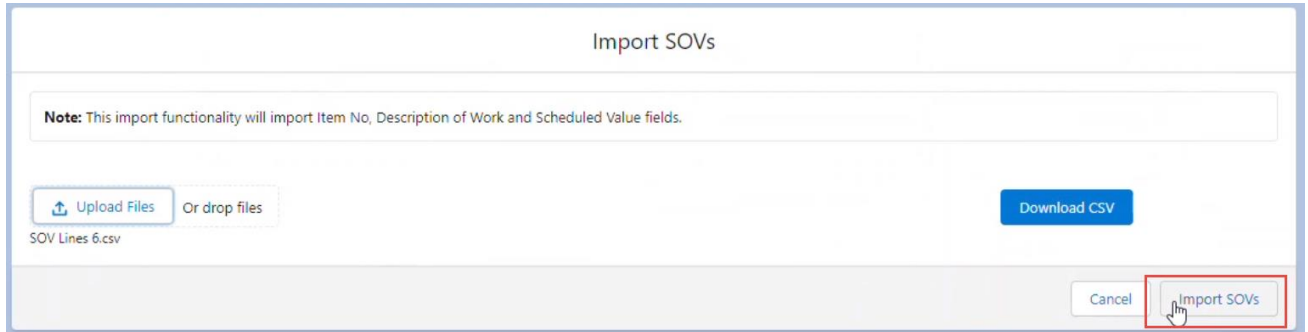


8. Click **Upload Files**.



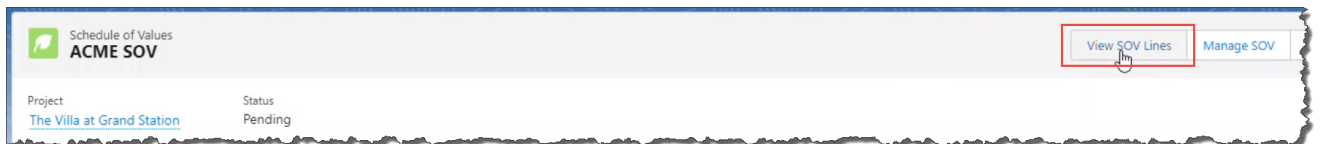
9. Locate an SOV file and click **Open**.

You return to the Import SOVs dialog.



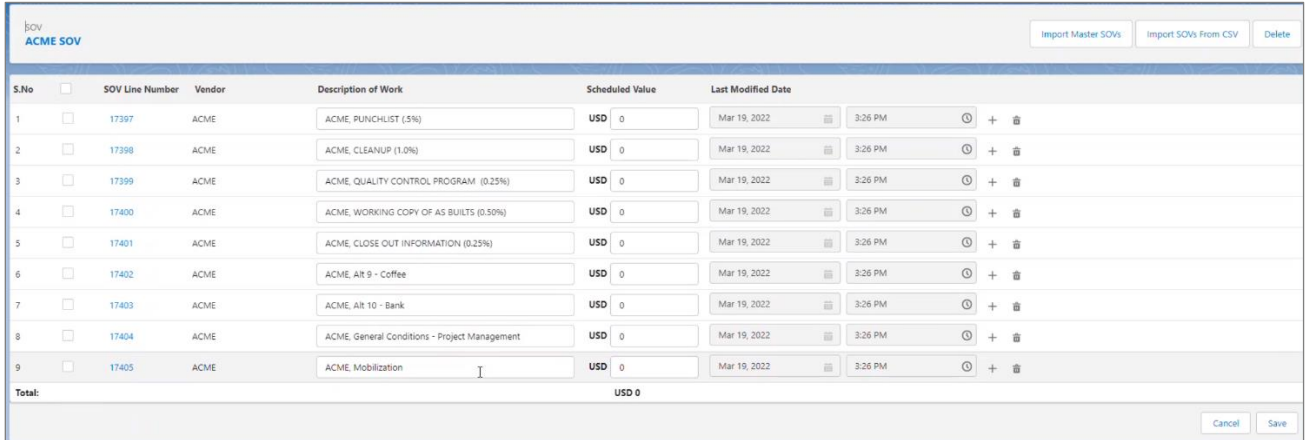
10. Click **Import SOVs**.

You return to the new SOVs tab.



View Vendor SOV Lines

11. Click **View SOV Lines**.



S.No	SOV Line Number	Vendor	Description of Work	Scheduled Value	Last Modified Date			
1	17397	ACME	ACME, PUNCHLIST (.5%)	USD 0	Mar 19, 2022	3:26 PM	+	
2	17398	ACME	ACME, CLEANUP (1.0%)	USD 0	Mar 19, 2022	3:26 PM	+	
3	17399	ACME	ACME, QUALITY CONTROL PROGRAM (0.25%)	USD 0	Mar 19, 2022	3:26 PM	+	
4	17400	ACME	ACME, WORKING COPY OF AS BUILTS (0.50%)	USD 0	Mar 19, 2022	3:26 PM	+	
5	17401	ACME	ACME, CLOSE OUT INFORMATION (0.25%)	USD 0	Mar 19, 2022	3:26 PM	+	
6	17402	ACME	ACME, Alt 9 - Coffee	USD 0	Mar 19, 2022	3:26 PM	+	
7	17403	ACME	ACME, Alt 10 - Bank	USD 0	Mar 19, 2022	3:26 PM	+	
8	17404	ACME	ACME, General Conditions - Project Management	USD 0	Mar 19, 2022	3:26 PM	+	
9	17405	ACME	ACME, Mobilization	USD 0	Mar 19, 2022	3:26 PM	+	
Total:				USD 0				

These are the lines that you are asking the vendor to submit pricing for.

- If you need to add more lines, click the + button at the end of any row.

12. Click **Save**.

You return to the SOV window.

Check that the SOV lines have been added...

If you want to verify that the form has been signed, you can do so in the Schedule of Values Lines section:



SOV Id	Description of Work	Scheduled Value	Status
17397	ACME, PUNCHLIST (.5%)	USD 0.00	Pending
17398	ACME, CLEANUP (1.0%)	USD 0.00	Pending
17399	ACME, QUALITY CONTROL PROGRAM (0.25%)	USD 0.00	Pending
17400	ACME, WORKING COPY OF AS BUILTS (0.50%)	USD 0.00	Pending
17401	ACME, CLOSE OUT INFORMATION (0.25%)	USD 0.00	Pending
17402	ACME, Alt 9 - Coffee	USD 0.00	Pending

Submit a Vendor SOV

13. Click **Company Submitted**, then **Mark as Current Status**.

This allows the vendor to see the SOV.



On the vendor's side...

The vendor can now see the new SOV:

Schedule of Values
All

7 items • Sorted by Created Date • Filtered by All schedule of values • Updated a few seconds ago

Search this list...

Project	Schedule of Values Na...	Created Date ↓	Type	Due Date	Date Submitted	Total Costs	Vendor	Status
1 The Villa at Grand ...	ACME SOV	3/19/2022 1:25 PM	Vendor	3/25/2022		USD 0.00	ACME	Company Submitted
2 Varma Test Project	test test ACME SOV	3/18/2022 5:02 AM		4/1/2022		USD 0.00	ACME	Company Submitted
3 AAAA	ACME SOV	3/15/2022 3:37 AM		3/25/2022	3/15/2022 6:05 AM	USD 6,365.00	ACME	Company Approved
4 AAAA	csv check sov	3/13/2022 10:38 AM			3/13/2022 10:40 AM	USD 300.00	ACME	Vendor Submitted
5 Varma Test Project	Varma master sov	3/10/2022 3:12 AM				USD 1,200.00		Pending
6 Varma Test Project	Test Varma SOV	3/9/2022 6:02 AM			3/9/2022 6:18 AM	USD 3,333.00	ACME	Company Submitted
7 Varma Test Project	Varma V SOV	3/8/2022 8:57 PM	Vendor	3/25/2022		USD 6,000.00	ACME	Pending

The vendor will act on the SOV, then submit it.

When the vendor submits the SOV, it appears as Vendor Submitted:

Schedule of Values
ACME SOV

View SOV Lines Manage SOV Create Contract Import a Master SOV Import an SOV from a CSV File

Project: The Villa at Grand Station Status: Vendor Submitted

Progress bar: Pending → Company Submitted → Vendor Submitted → Company Rejected → Company Approved → Mark Status as Complete

Details Related

Information

Schedule of Values Name ACME SOV	Project The Villa at Grand Station
-------------------------------------	---------------------------------------

Activity

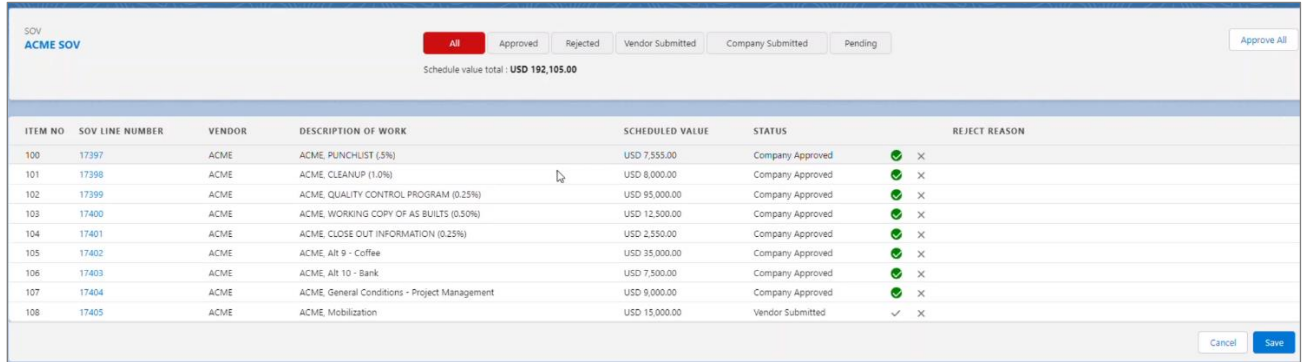
Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

Approve a Vendor SOV

14. Click **Manage SOV**.

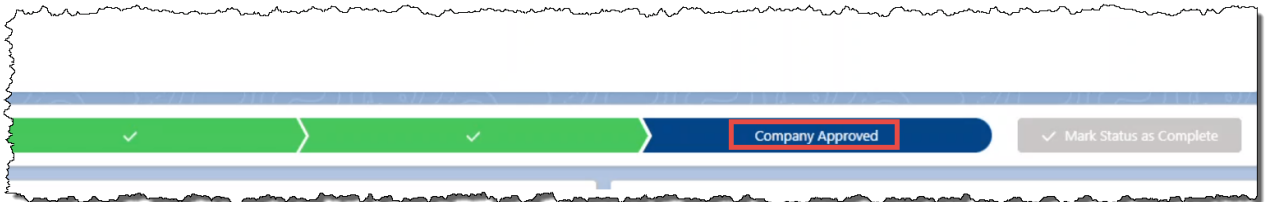


ITEM NO	SOV LINE NUMBER	VENDOR	DESCRIPTION OF WORK	SCHEDULED VALUE	STATUS	REJECT REASON
100	17397	ACME	ACME PUNCHLIST (0.5%)	USD 7,555.00	Company Approved	✓ X
101	17398	ACME	ACME CLEANUP (1.0%)	USD 8,000.00	Company Approved	✓ X
102	17399	ACME	ACME QUALITY CONTROL PROGRAM (0.25%)	USD 95,000.00	Company Approved	✓ X
103	17400	ACME	ACME WORKING COPY OF AS BUILTS (0.50%)	USD 12,500.00	Company Approved	✓ X
104	17401	ACME	ACME CLOSE OUT INFORMATION (0.25%)	USD 2,550.00	Company Approved	✓ X
105	17402	ACME	ACME Airt 9 - Coffee	USD 35,000.00	Company Approved	✓ X
106	17403	ACME	ACME Airt 10 - Bank	USD 7,500.00	Company Approved	✓ X
107	17404	ACME	ACME General Conditions - Project Management	USD 9,000.00	Company Approved	✓ X
108	17405	ACME	ACME Mobilization	USD 15,000.00	Vendor Submitted	✓ X

15. Approve each line and click **Save**.

- You may reject one or more lines and require the vendor to re-submit them. To approve the SOV in its entirety, each line must be approved.
- Once approved, the values here are the dollar amounts used in a request for payment at the end of the project.

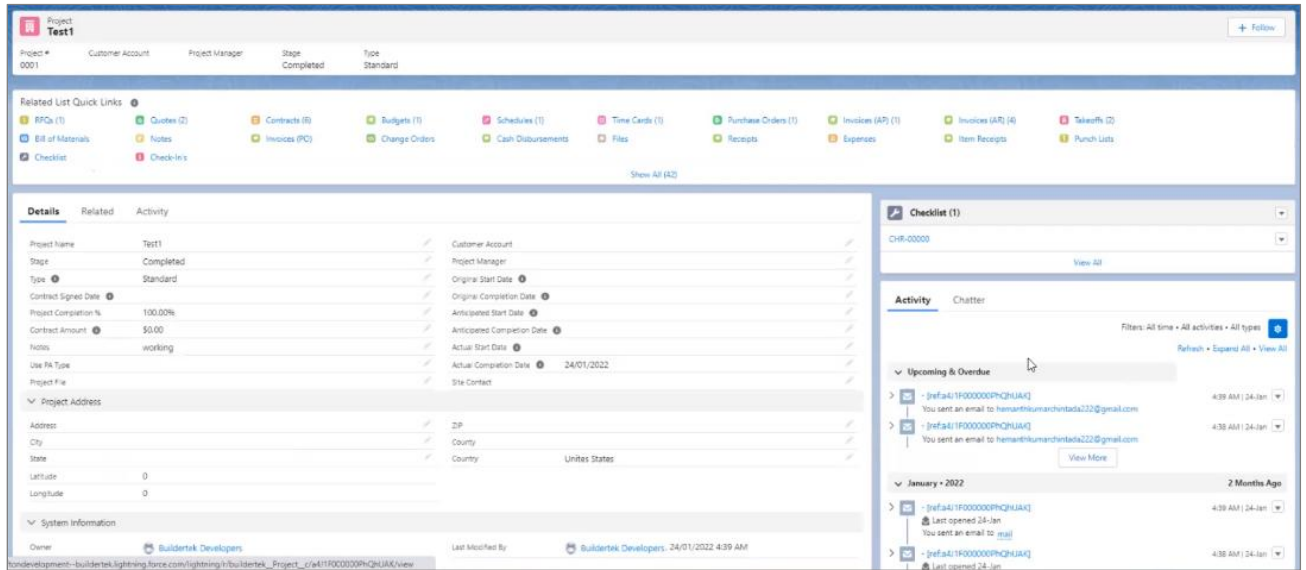
The SOV status changes to Company Approved:



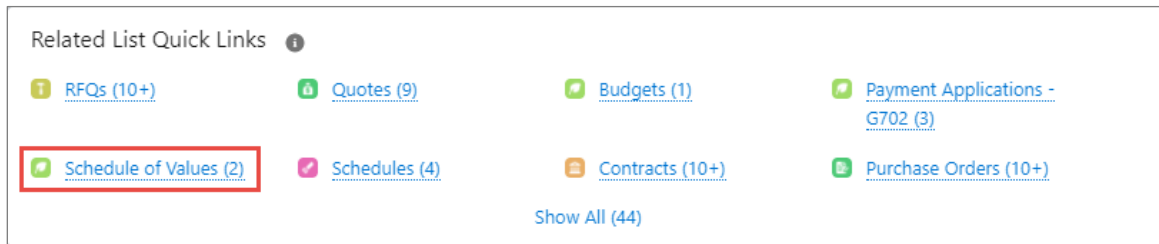
Standard SOV

Create a Standard SOV

1. Open a project.

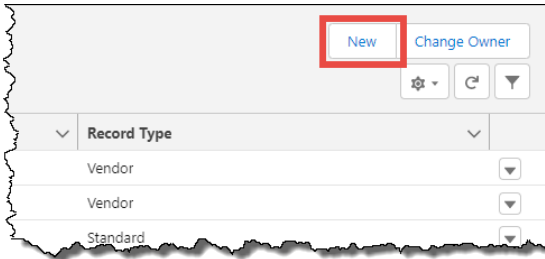


2. Click the **Schedule of Values** icon in *Quick Links*.

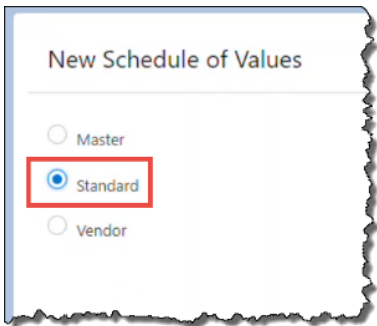


The RFQ window opens.

3. Click **New**.



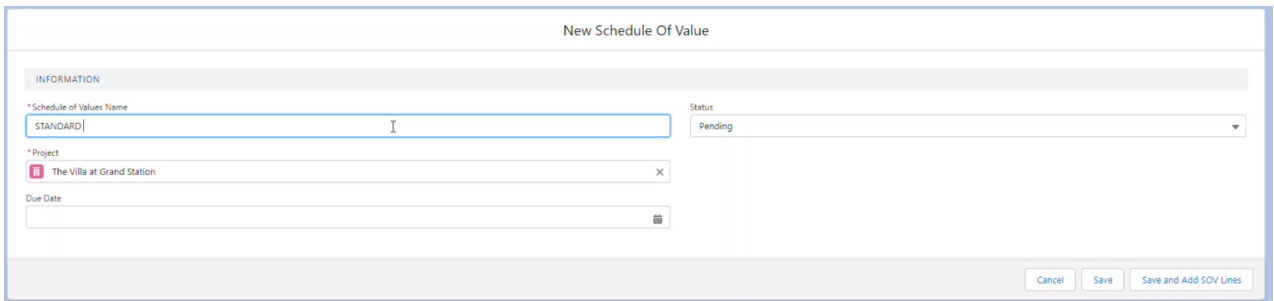
The New Schedule of Values window opens:



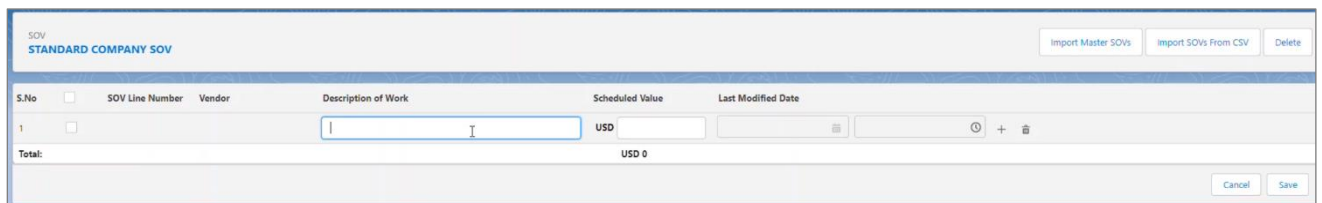
4. Select the **Standard** option, then click **Next**.

- **Master**—select this option to create an SOV template.
- **Standard**—select this option to create a Standard SOV that includes all costs (including vendor costs).
- **Vendor**—select this option to create a [Vendor SOV](#).

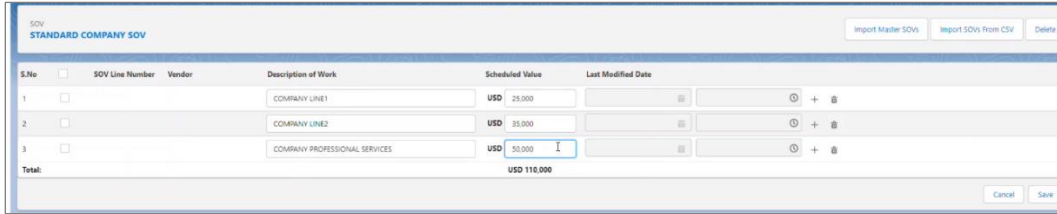
The Information window opens:



5. Click **Save and Add SOV Lines**.



6. Add SOV lines.

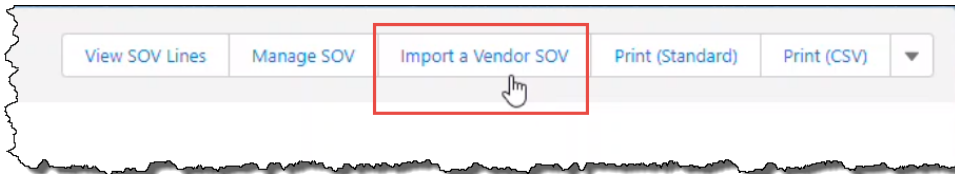


S.No	SOV Line Number	Vendor	Description of Work	Scheduled Value	Last Modified Date
1			COMPANY LINE1	USD 29,000	
2			COMPANY LINE2	USD 35,000	
3			COMPANY PROFESSIONAL SERVICES	USD 50,000	
Total:				USD 110,000	

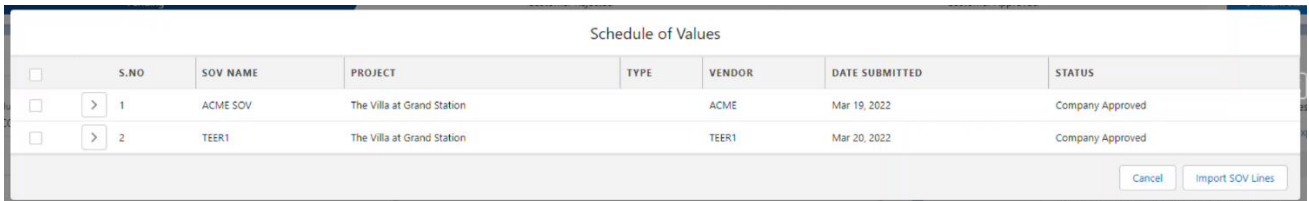
7. Click **Save**.

Import a Vendor SOV into a Standard SOV

8. Click **Import a Vendor SOV**.



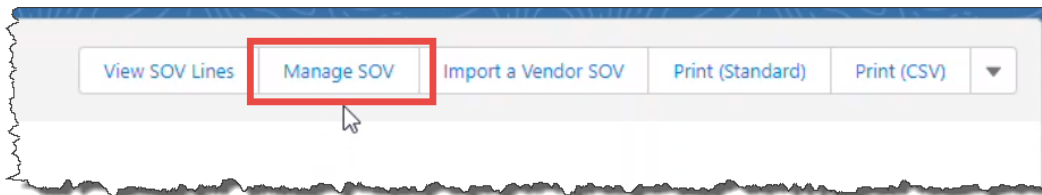
The *Schedule of Values* dialog opens:



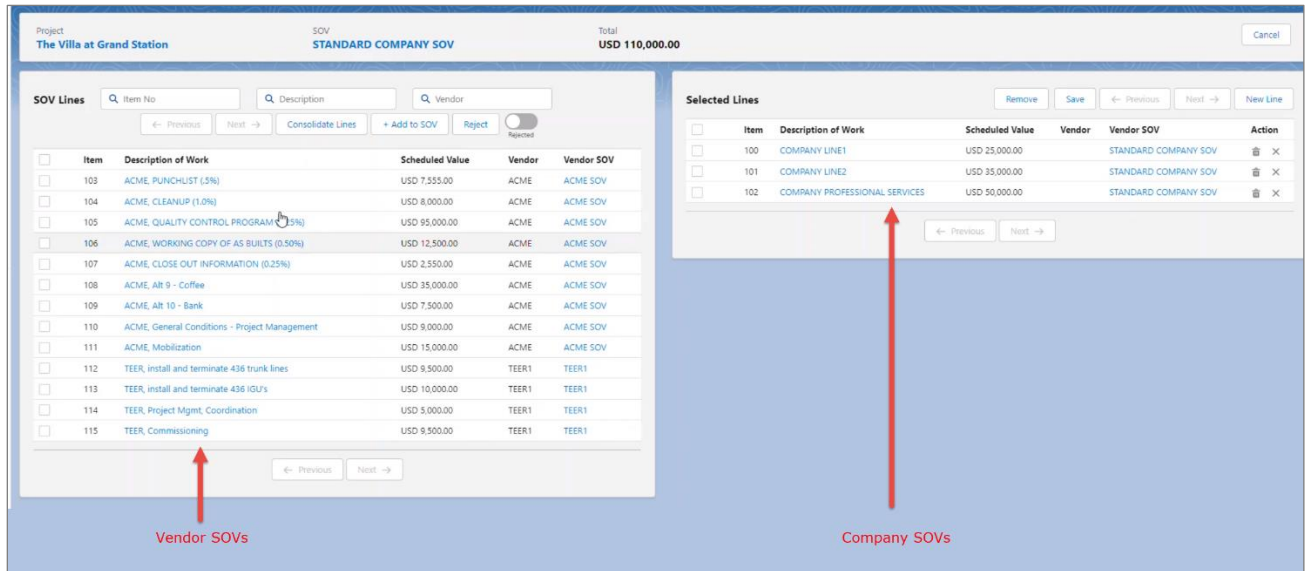
S.NO	SOV NAME	PROJECT	TYPE	VENDOR	DATE SUBMITTED	STATUS
1	ACME SOV	The Villa at Grand Station		ACME	Mar 19, 2022	Company Approved
2	TEER1	The Villa at Grand Station		TEER1	Mar 20, 2022	Company Approved

9. Select the desired vendor SOV(s), then click **Import SOV Lines**.

10. Click **Manage SOV**.



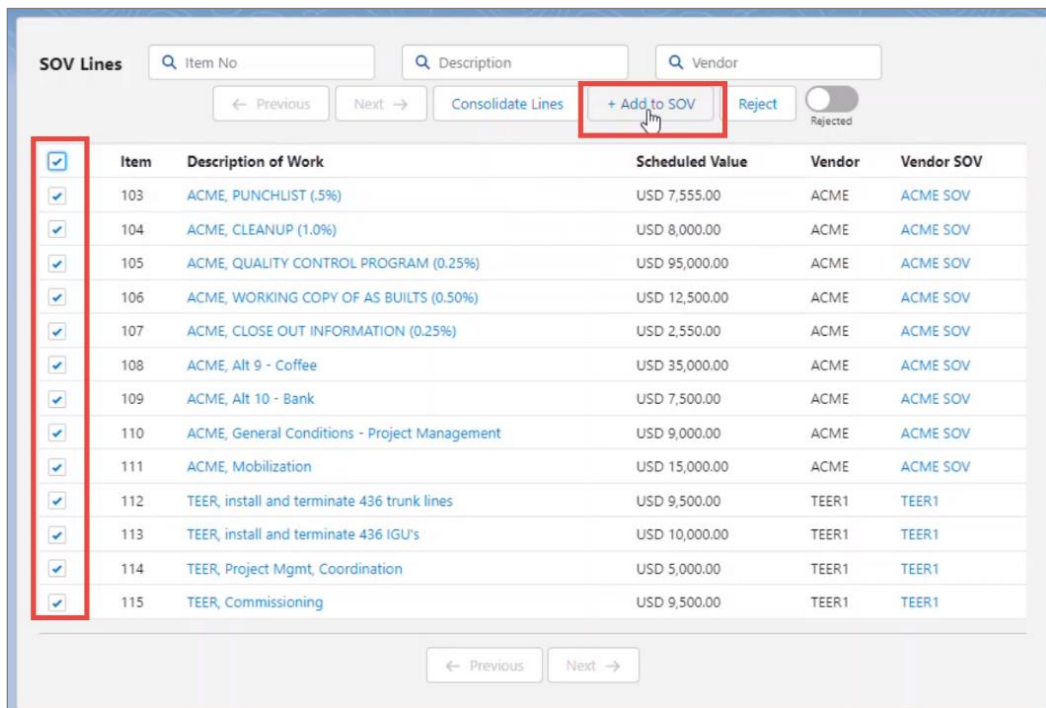
The *Manage SOV* window opens:



The screenshot shows the 'Manage SOV' window for 'The Villa at Grand Station' project. The window is titled 'STANDARD COMPANY SOV' and shows a total value of 'USD 110,000.00'. It is divided into two main sections: 'SOV Lines' on the left and 'Selected Lines' on the right. The 'SOV Lines' section contains a table of 15 items, each with a checkbox, an item number, a description, a scheduled value, a vendor, and a vendor SOV. The 'Selected Lines' section shows three items that have been selected for the company SOV. Red arrows point to the 'Vendor SOVs' column in the 'SOV Lines' table and the 'Company SOVs' column in the 'Selected Lines' table.

Item	Description of Work	Scheduled Value	Vendor	Vendor SOV
103	ACME, PUNCHLIST (.5%)	USD 7,555.00	ACME	ACME SOV
104	ACME, CLEANUP (1.0%)	USD 8,000.00	ACME	ACME SOV
105	ACME, QUALITY CONTROL PROGRAM (0.25%)	USD 95,000.00	ACME	ACME SOV
106	ACME, WORKING COPY OF AS BUILTS (0.50%)	USD 12,500.00	ACME	ACME SOV
107	ACME, CLOSE OUT INFORMATION (0.25%)	USD 2,550.00	ACME	ACME SOV
108	ACME, Alt 9 - Coffee	USD 35,000.00	ACME	ACME SOV
109	ACME, Alt 10 - Bank	USD 7,500.00	ACME	ACME SOV
110	ACME, General Conditions - Project Management	USD 9,000.00	ACME	ACME SOV
111	ACME, Mobilization	USD 15,000.00	ACME	ACME SOV
112	TEER, install and terminate 436 trunk lines	USD 9,500.00	TEER1	TEER1
113	TEER, install and terminate 436 IGU's	USD 10,000.00	TEER1	TEER1
114	TEER, Project Mgmt, Coordination	USD 5,000.00	TEER1	TEER1
115	TEER, Commissioning	USD 9,500.00	TEER1	TEER1

11. Select SOV lines, then click **Add to SOV**.



This screenshot shows a close-up of the 'SOV Lines' table. The table has columns for 'Item', 'Description of Work', 'Scheduled Value', 'Vendor', and 'Vendor SOV'. All 15 rows in the table have their checkboxes selected. A red box highlights the '+ Add to SOV' button in the toolbar above the table. A mouse cursor is shown clicking on this button.

Item	Description of Work	Scheduled Value	Vendor	Vendor SOV
103	ACME, PUNCHLIST (.5%)	USD 7,555.00	ACME	ACME SOV
104	ACME, CLEANUP (1.0%)	USD 8,000.00	ACME	ACME SOV
105	ACME, QUALITY CONTROL PROGRAM (0.25%)	USD 95,000.00	ACME	ACME SOV
106	ACME, WORKING COPY OF AS BUILTS (0.50%)	USD 12,500.00	ACME	ACME SOV
107	ACME, CLOSE OUT INFORMATION (0.25%)	USD 2,550.00	ACME	ACME SOV
108	ACME, Alt 9 - Coffee	USD 35,000.00	ACME	ACME SOV
109	ACME, Alt 10 - Bank	USD 7,500.00	ACME	ACME SOV
110	ACME, General Conditions - Project Management	USD 9,000.00	ACME	ACME SOV
111	ACME, Mobilization	USD 15,000.00	ACME	ACME SOV
112	TEER, install and terminate 436 trunk lines	USD 9,500.00	TEER1	TEER1
113	TEER, install and terminate 436 IGU's	USD 10,000.00	TEER1	TEER1
114	TEER, Project Mgmt, Coordination	USD 5,000.00	TEER1	TEER1
115	TEER, Commissioning	USD 9,500.00	TEER1	TEER1

They appear in the *Selected Lines* column:

Selected Lines						
Item	Description of Work	Scheduled Value	Vendor	Vendor SOV	Action	
100	COMPANY LINE1	USD 25,000.00		STANDARD COMPANY SOV		
101	COMPANY LINE2	USD 35,000.00		STANDARD COMPANY SOV		
102	COMPANY PROFESSIONAL SERVICES	USD 50,000.00		STANDARD COMPANY SOV		
103	ACME, PUNCHLIST (.5%)	USD 7,555.00	ACME	ACME SOV		
104	ACME, CLEANUP (1.0%)	USD 8,000.00	ACME	ACME SOV		
105	ACME, QUALITY CONTROL PROGRAM (0.25%)	USD 95,000.00	ACME	ACME SOV		
106	ACME, WORKING COPY OF AS BUILTS (0.50%)	USD 12,500.00	ACME	ACME SOV		
107	ACME, CLOSE OUT INFORMATION (0.25%)	USD 2,550.00	ACME	ACME SOV		
108	ACME, Alt 9 - Coffee	USD 35,000.00	ACME	ACME SOV		
109	ACME, Alt 10 - Bank	USD 7,500.00	ACME	ACME SOV		
110	ACME, General Conditions - Project Management	USD 9,000.00	ACME	ACME SOV		
111	ACME, Mobilization	USD 15,000.00	ACME	ACME SOV		
112	TEER, install and terminate 436 trunk lines	USD 9,500.00	TEER1	TEER1		
113	TEER, install and terminate 436 IGU's	USD 10,000.00	TEER1	TEER1		
114	TEER, Project Mgmt, Coordination	USD 5,000.00	TEER1	TEER1		
115	TEER, Commissioning	USD 9,500.00	TEER1	TEER1		

- You can add, remove, or create lines.

12. Click **Save**.

Check that the SOV lines have been added...

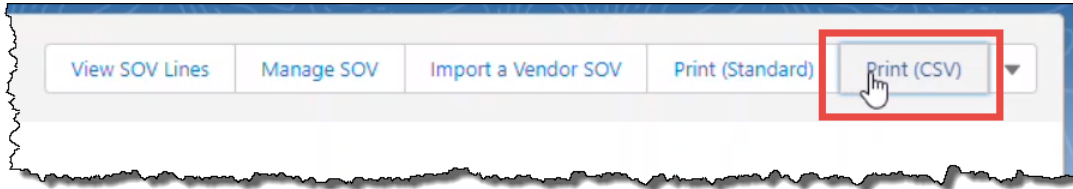
If you want to verify that the SOV lines have been added, check in the Schedule of Values Lines section:

SOV Id	Description of Work	Scheduled Value	Status	Rejection Reason
17499	COMPANY LINE1	USD 25,000.00	Pending	
17500	COMPANY LINE2	USD 35,000.00	Pending	
17501	COMPANY PROFESSIONAL SERVICES	USD 50,000.00	Pending	
17502	ACME, PUNCHLIST (.5%)	USD 7,555.00	Pending	
17503	ACME, CLEANUP (1.0%)	USD 8,000.00	Pending	

Email SOV to Customer

13. Click **Print (CSV)**.

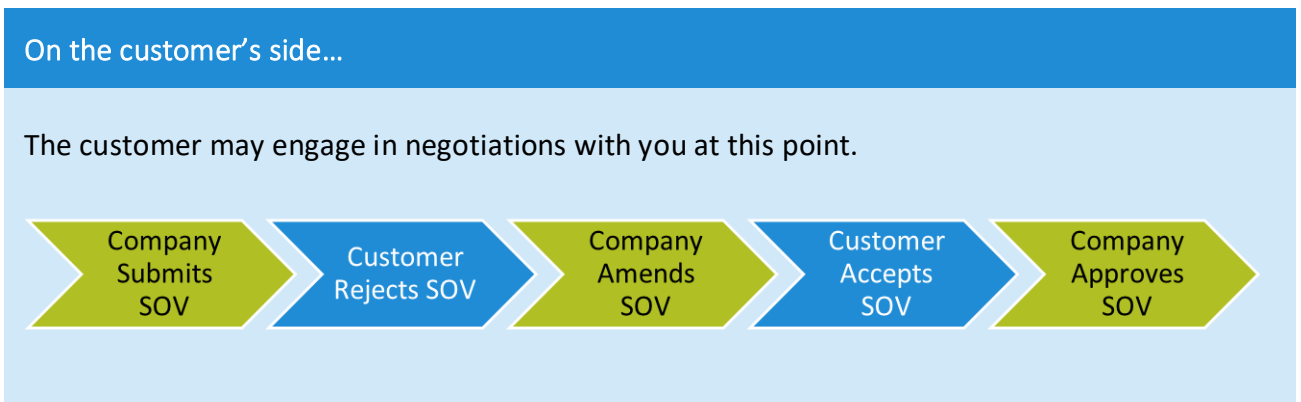
- **Print Standard** outputs in Word doc format.



The SOV opens in MS Excel.

Schedule of Values			View												
Company:			Buildertek Inc Blue Springs 18845477225 sriram.bodda@diligentforcslabs.com		SOV Name:		STANDARD COMPANY SO								
Project #			0062		Vendor:		Pending								
Project :			The Villa at Grand Station		SOV Type:		Standard								
					Submitted Date:										
					Total Costs:		USD 336,105								
A	B	C	D		E		F		G		H		I	J	K
Item No	SOV Line Description	Scheduled Amount (I)	Previously Invoiced		Completed To Date		This Claim		Less 10%		Please Pay				
			Percent	Amount	Percent	Amount	Percent	Amount	Holdback						
100	COMPANY LINE1	25,000													
101	COMPANY LINE2	36,000													
102	COMPANY PROFESSIONAL SERVICES	50,000													
103	ACME_PUNCHLIST (5%)	7,555													
104	ACME_CLEANUP (1.0%)	6,000													
105	ACME_QUALITY CONTROL PROGRAM (0.25%)	95,000													
106	ACME_WORKING COPY OF AS BUILTS (0.50%)	12,500													
107	ACME_CLOSE OUT INFORMATION (0.25%)	2,550													
108	ACME_Alt 9 - Coffee	35,000													
109	ACME_Alt 10 - Bank	7,500													
110	ACME_General Conditions - Project Management	9,000													
111	ACME_Mobilization	15,000													
112	TEER_install and terminate 436 trunk lines	9,500													
113	TEER_install and terminate 436 KGU's	10,000													
114	TEER_Project Mgmt_Coordination	5,000													
115	TEER_Commissioning	9,500													
	Total	336,105													

14. Email the CSV file to your customer.



Reject or Delete an SOV Line

15. Click **Manage SOV**.

The *Manage SOV* window opens.

Selected Lines						Remove	Save	← Previous	Next →	New Line
<input type="checkbox"/>	Item	Description of Work	Scheduled Value	Vendor	Vendor SOV	Action				
<input type="checkbox"/>	100	COMPANY LINE1	USD 25,000.00	BuilderTek	STANDARD COMPANY SOV	🗑️ ×				
<input type="checkbox"/>	101	COMPANY LINE2	USD 35,000.00	BuilderTek	STANDARD COMPANY SOV	🗑️ ×				
<input type="checkbox"/>	102	COMPANY PROFESSIONAL SERVICES	USD 50,000.00	BuilderTek	STANDARD COMPANY SOV	🗑️ ×				
<input type="checkbox"/>	103	ACME, PUNCHLIST (.5%)	USD 7,555.00	BuilderTek	ACME SOV	🗑️ ×				
<input type="checkbox"/>	104	ACME, CLEANUP (1.0%)	USD 8,000.00	BuilderTek	ACME SOV	🗑️ ×				
<input type="checkbox"/>	105	ACME, QUALITY CONTROL PROGRAM (0.25%)	USD 95,000.00	BuilderTek	ACME SOV	🗑️ ×				
<input type="checkbox"/>	106	ACME, WORKING COPY OF AS BUILTS (0.50%)	USD 12,500.00	BuilderTek	ACME SOV	🗑️ ×				
<input type="checkbox"/>	107	ACME, CLOSE OUT INFORMATION (0.25%)	USD 2,550.00	BuilderTek	ACME SOV	🗑️ ×				
<input type="checkbox"/>	108	ACME, Alt 9 - Coffee	USD 35,000.00	BuilderTek	ACME SOV	🗑️ ×				

16. Manage the SOV as required:

- **Reject** an SOV line—Click the **x** button. You are prompted to enter a reason for the rejection.

Reject SOV Line

* Reject Reason

This is too much please reduce.

- **Delete** an SOV line—Click the 🗑️ icon.
- **Edit** an SOV Line—click the line item, enter a new value, then save.

Confirm with Vendor

On the vendor's side...

The vendor receives an email stating that an SOV they have submitted has been rejected. When they open the SOV, the status appears as Company Rejected:

Schedule of Values
ACME SOV

Project
[The Villa at Grand Station](#)

Status
Company Rejected

DETAILS RELATED

Schedule of Values Name
ACME SOV

Total Costs
USD 192,105.00

Status
Company Rejected

Due Date
3/25/2022

Date Submitted
3/19/2022 1:36 PM

Project
[The Villa at Grand Station](#)

Vendor
[ACME](#)

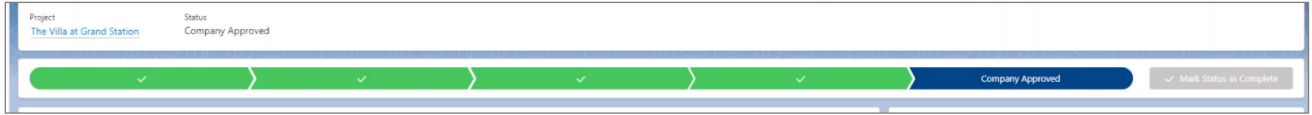
The vendor must modify and save the SOV then resubmit it.

17. Click **Manage SOV**.

ITEM NO	SOV LINE NUMBER	VENDOR	DESCRIPTION OF WORK	SCHEDULED VALUE	STATUS	
100	17397	ACME	ACME, PUNCHLIST (.5%)	USD 7,555.00	Company Approved	✓ X
101	17398	ACME	ACME, CLEANUP (1.0%)	USD 8,000.00	Company Approved	✓ X
102	17399	ACME	ACME, QUALITY CONTROL PROGRAM (0.25%)	USD 85,000.00	Vendor Submitted	✓ X
103	17400	ACME	ACME, WORKING COPY OF AS BUILTS (0.50%)	USD 12,500.00	Company Approved	✓ X
104	17401	ACME	ACME, CLOSE OUT INFORMATION (0.25%)	USD 2,550.00	Company Approved	✓ X

18. Review and approve the resubmitted SOV line.

The SOV status changes to *Company Approved*:



19. Review, reprint, and email out the new SOV.

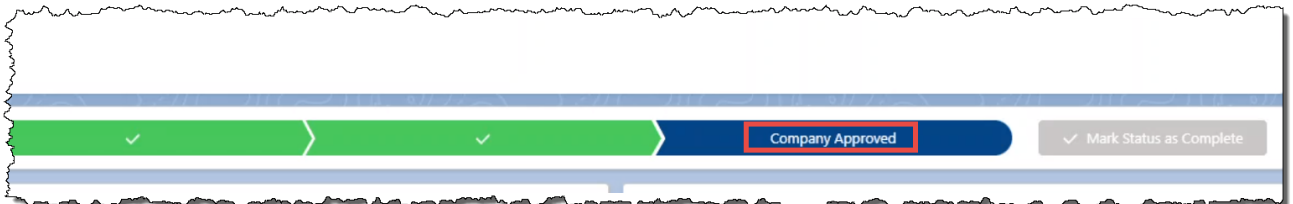
On the customer's side...

The customer reviews the revised SOV.

A	B	C	D	E
Item No	SOV Line Description	Scheduled Amount (U)	Previously Invoiced	
			Percent	Amount
100	COMPANY LINE1	25,000		
101	COMPANY LINE2	35,000		
102	COMPANY PROFESSIONAL SERVICES	35,000		
103	ACME, PUNCHLIST (.5%)	7,555		
104	ACME, CLEANUP (1.0%)	8,000		
106	ACME, WORKING COPY OF AS BUILTS (0.50%)	12,500		
107	ACME, CLOSE OUT INFORMATION (0.25%)	2,550		
108	ACME, Alt 9 - Coffee	4,000		
109	ACME, Alt 10 - Bank	7,500		
110	ACME, General Conditions - Project Management	9,000		
111	ACME, Mobilization	15,000		
112	TEER, install and terminate 436 trunk lines	9,500		
113	TEER, install and terminate 436 IGU's	10,000		
114	TEER, Project Mgmt, Coordination	5,000		
115	TEER, Commissioning	9,500		
	Total	226,105		

They will modify the value and resubmit the SOV.

The status of the SOV changes to Customer Approved.



At this point, the SOV is complete.

Note: You cannot import any further information into an approved SOV.

Payment Applications



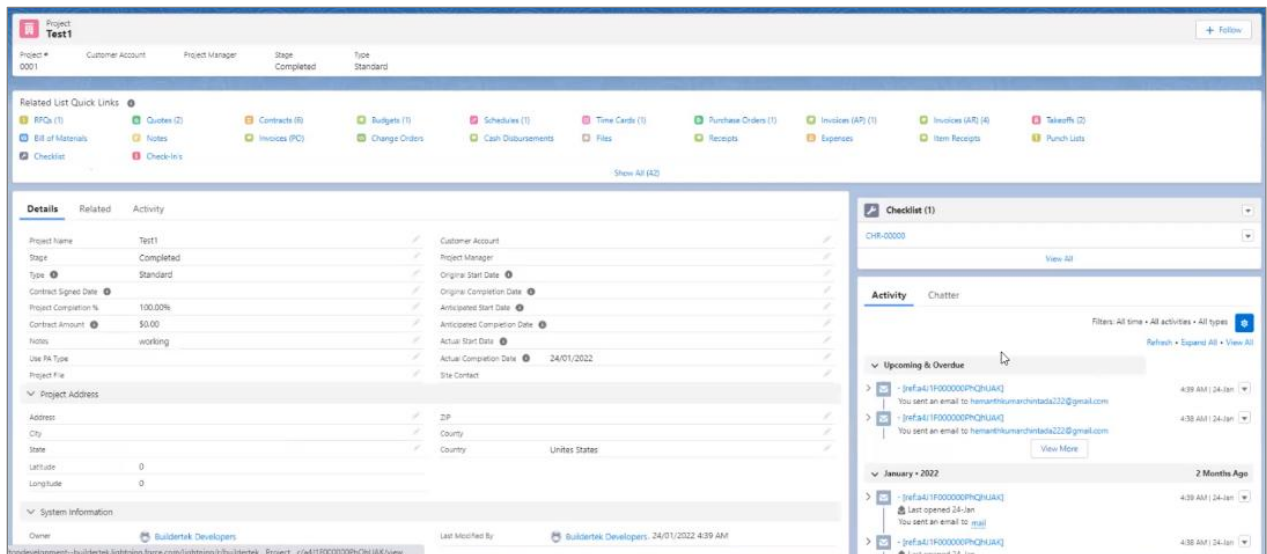
The Payment Applications app is located in the **Projects** module.

AR (Accounts Receivable) Payment App

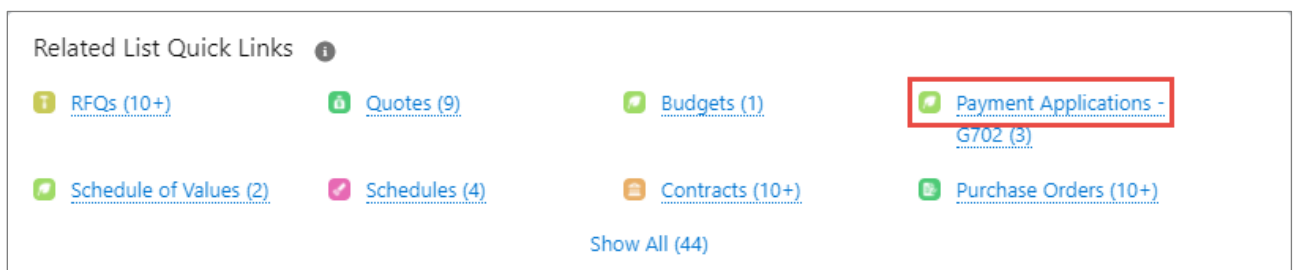
Accounts receivable refers to money coming into your company. The AR Payments App is a module for requesting payment from your customers.

To create a new AR payment request:

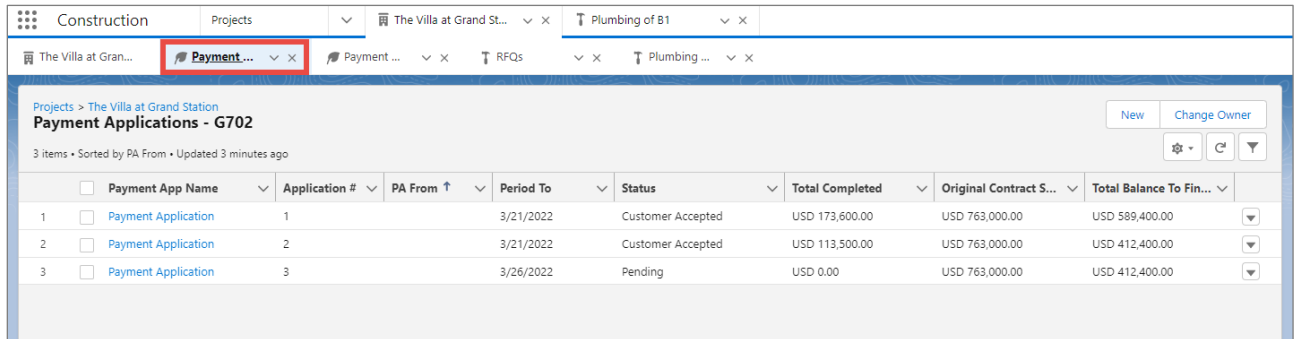
1. Open a project.



2. Click the **Payment Applications** icon in the *Quick Links*.



The Payment Applications app opens in a new tab:



3. Click **New**.

A dialog opens, allowing you to select a payment application type:

Please Select an option

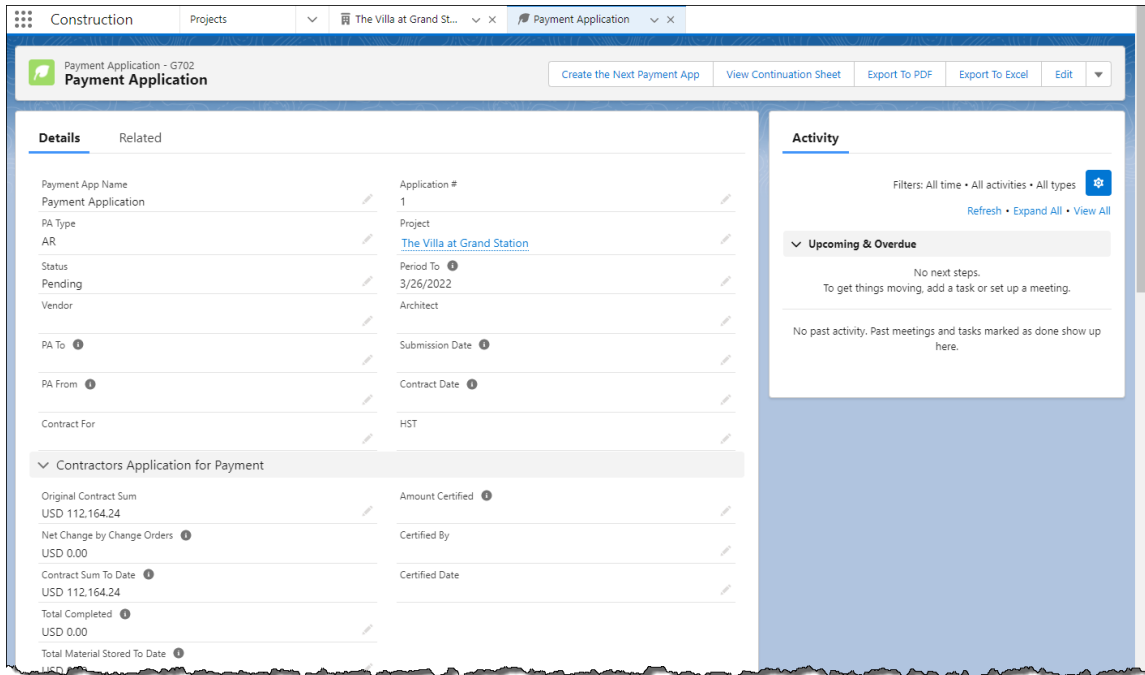
New Payment Application

Import Company Accepted Vendor Payment Apps

Import Company Approved / Import Customer Approved SOVs

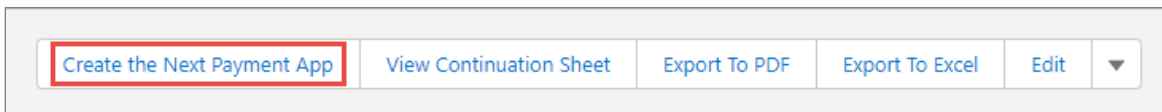
- **New Payment Application**—create a new payment application.
- **Import Company Accepted Vendor Payment Apps**—allows you to import an existing vendor payment application.
- **Import Company Approved / Import Customer Approved SOVs**—allows you to select and import an existing payment application that has been previously approved by the customer and/or your company.

4. Select an option, then click **Next**.



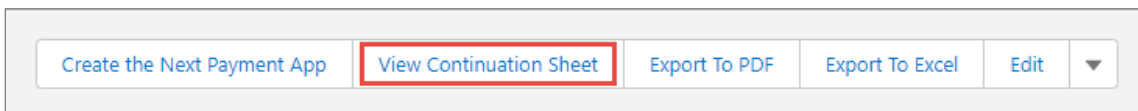
Create the Next Payment App

5. Click **Create the Next Payment App**.



View the Continuation Sheet

6. Click **View Continuation Sheet**.



AP (Accounts Payable) Payment App

Accounts payable (AP) refers to money your company needs to pay to vendors or suppliers. The AP Payments App is a module for requesting payment from your customers.

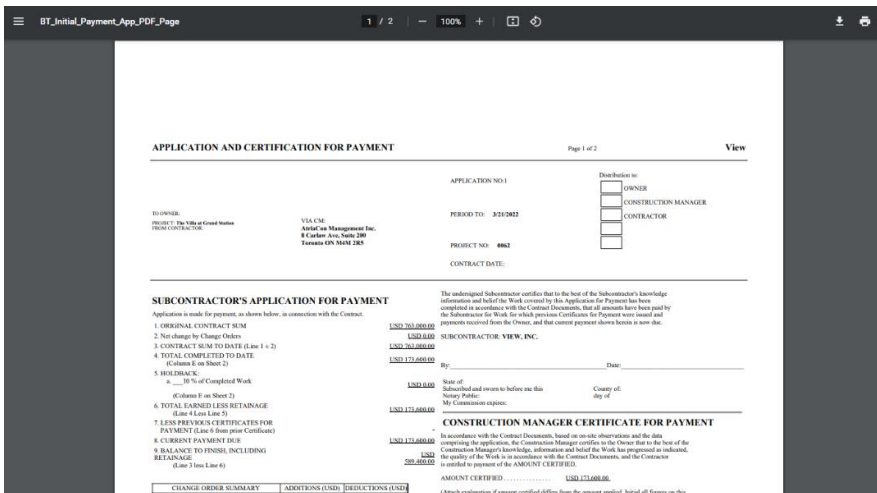
Create a New AP Payment Request

1. Open a project.

Export a Payment Application

You can export the payment application in the following formats:

- **PDF**—click **Export to PDF**. The payment application opens immediately as a PDF in a new tab:



- **Excel**—click **Export to Excel**. A dialog box opens, allowing you to save the file, then open it in Excel:

APPLICATION AND CERTIFICATE FOR PAYMENT		AIA DOCUMENT		Page 1 of 2	
TO:	VIA ARCHITEC	Project:	The Villa at Grand Station	APPLICATION NO.:	1
FROM:	VIA ARCHITEC			PERIOD TO:	03/31/2022
				PROJECT NOS.:	0062
				CONTRACT DATE:	
				P. O. NUMBER:	
CONTRACTOR'S APPLICATION FOR PAYMENT		The undersigned Contractor certifies that to the best of the Contractor's knowledge, information, and belief, the Work covered by this Application for Payment has been completed in accordance with the Contract Documents, that all amounts have been paid by the Contractor for Work for which previous Certificates for Payment were issued and payments received from the Owner, and that current payment shown herein is now due.			
1.	ORIGINAL CONTRACT SUM	USD	763,000.00		
2.	Net Change By Change Orders	USD	0.00		
3.	CONTRACT SUM TO DATE	USD	763,000.00		
4.	TOTAL COMPLETED AND STORED	USD	173,600.00	By:	
5.	RETAINAGE	USD	0.00		
6.	TOTAL EARNED LESS RETAINAGE	USD	173,600.00		
7.	LESS PREVIOUS CERTIFICATES FOR PAYMENT	USD	0.00		
8.	CURRENT PAYMENT DUE	USD	173,600.00	AMOUNT CERTIFIED: USD 173,600.00	
9.	BALANCE TO FINISH, INCLUDING RETAINAGE	USD	589,400.00		
CHANGE ORDER SUMMARY		ADDITIONS (USD)		DEDUCTIONS (USD)	
Total changes approved in previous month		0.00		0.00	
Total approved this month		0.00		0.00	
NET CHANGES by Change Order		0.00		0.00	