

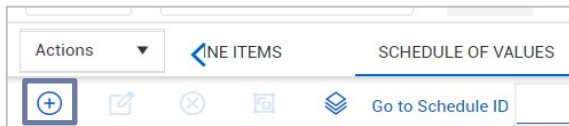
QUICK GUIDE

SCHEDULE OF VALUES



ADDING A NEW SCHEDULE ITEM

1. Click **New Schedule item** icon from the Schedule of Values tab.



2. Complete **Add schedule item** dialog box.

Add schedule item

DETAILS CONTRACT CLAIM CONTRACT CLAIM HISTORY

| | |
|-----------------------|---------------------------|
| Contract line item ID | *Description |
| Select item... | |
| Schedule quantity | *UoM |
| 0.00 | Select item... |
| Unit price | Scheduled value |
| \$0.00 | \$0.00 |
| WBS code | Hide in plan and progress |
| | YES |
| Custom list 1 | Custom list 2 |
| | |

SCHEDULE OF VALUES REGISTER

| Schedule line item | Contract line item ID | Description | Unit price | Schedule values | WBS code | Hide in plan and progress | Contract | Component progress | | | |
|------------------------------|-----------------------|-------------|------------|-----------------|-------------------|---------------------------|------------------|--------------------|------------------|---------------|------------------|
| | | | | | | | Quantity claimed | Value claimed | Quantity claimed | Value claimed | Quantity claimed |
| <input type="checkbox"/> | 1 | 0001 | 0.00 | \$20,000.00 | 1087 - Structu... | <input type="checkbox"/> | 10.00000 | \$10,000.00 | 0 | 0 | 10.00000 |
| <input type="checkbox"/> | 2 | 0001 | 0.00 | \$5,000.00 | 1087 - Structu... | <input type="checkbox"/> | 2.00000 | \$2,000.00 | 1 | \$1,000.00 | 3.00000 |
| Totals: 2 Selected: 0 | | | | | | | | \$25,000.00 | | \$12,000.00 | \$1,000.00 |

Hide in Plan and Progress

Select the box to hide the schedule item from Plan and Progress. Deselect the box to track the schedule item as a contract component in Plan. If an item has a value other than zero in Plan and Progress, you cannot deselect this check box. If you have made a mistake, you must go to Plan or Progress, and then edit the item there. After it is edited, you can deselect the check box. A schedule item that is hidden in Plan and Progress can be claimed directly from Contract.

Contract


The Contract grid section shows the quantity and value claimed in Contract. The total amount claimed in Contract shows at the bottom of the section.

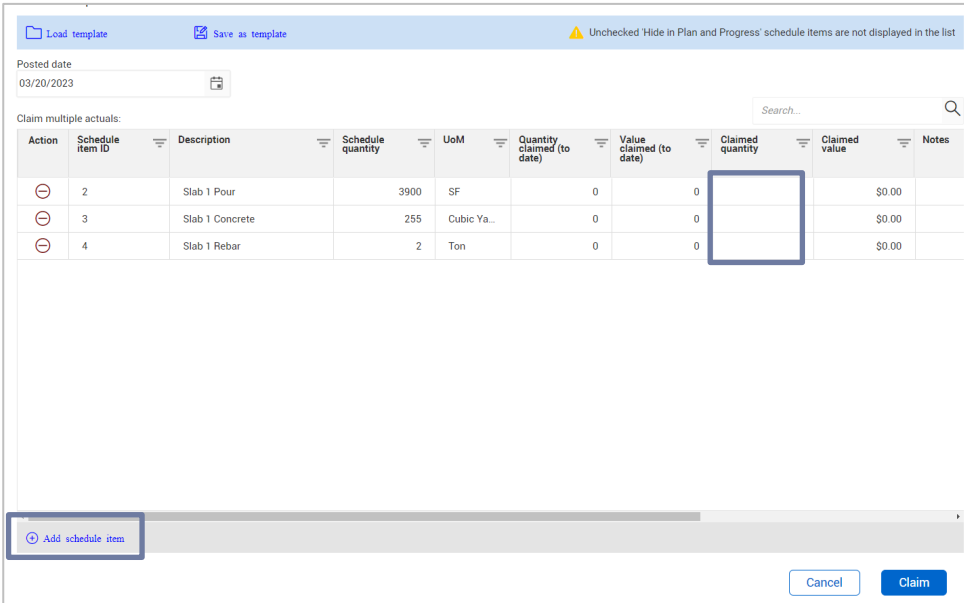
Component progress

The Component progress grid section shows claims that were made in Plan and Progress. Click on a link in the Quantity claimed or Value claimed column to go to quantity tracking in Plan.

The total amount claimed in Contract shows at the bottom of the section.

CLAIM MULTIPLE SCHEDULE ITEMS

1. From the Schedule of values register, select the schedule items you want to claim against.
2. Click the **Claim multiple schedule items**  icon. The Claim multiple schedule items dialog box opens.
3. Click **Add schedule item** for additional schedule items.
4. Enter the claimed quantities or values for the added items.



Load template Save as template Unchecked 'Hide in Plan and Progress' schedule items are not displayed in the list

Posted date: 03/20/2023


Claim multiple actuals:

| Action | Schedule item ID | Description | Schedule quantity | UoM | Quantity claimed (to date) | Value claimed (to date) | Claimed quantity | Claimed value | Notes |
|--------|------------------|-----------------|-------------------|-------------|----------------------------|-------------------------|------------------|---------------|-------|
| ⊖ | 2 | Slab 1 Pour | 3900 | SF | 0 | 0 | | \$0.00 | |
| ⊖ | 3 | Slab 1 Concrete | 255 | Cubic Ya... | 0 | 0 | | \$0.00 | |
| ⊖ | 4 | Slab 1 Rebar | 2 | Ton | 0 | 0 | | \$0.00 | |

Search...

⊕ Add schedule item


Cancel Claim

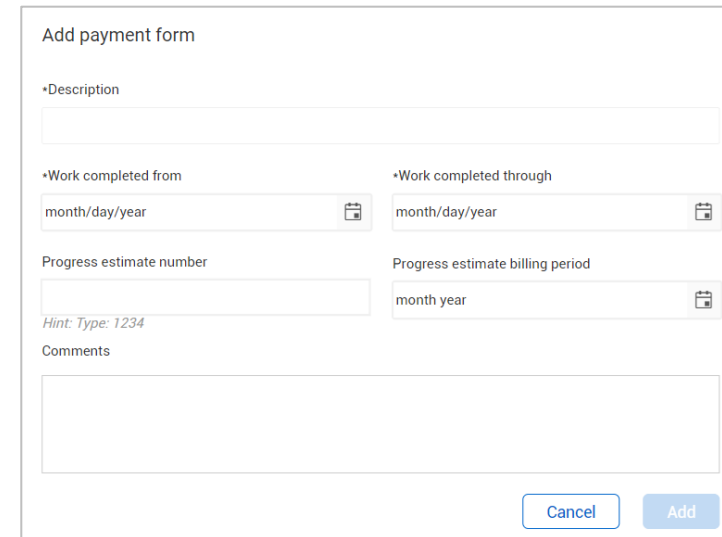
5. You can save this as a template to use later by clicking **Save as template**  **Save as template** button.
6. Click **Claim**.

NOTE: Unchecked 'Hide in Plan and Progress' schedule items are not displayed in the list.

CONVERT SOV TO A PAYMENT FORM

NOTE: You must have payment form permissions to convert schedule of value items to payment forms and the Contract type must be configured to use payment forms.

1. From the Schedule of values register, select the claimed items to convert.
2. Click the **Convert**  icon, and then select **Convert to payment form**. The Add payment form dialog box opens.



Add payment form

*Description

*Work completed from: month/day/year

*Work completed through: month/day/year

Progress estimate number

Progress estimate billing period: month year

Hint: Type: 1234

Comments

Cancel Add

3. Enter the payment form information, and then click **Add**.
4. The Payment form Details page opens.

NEED SOME MORE HELP?



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