## QUICK GUIDE SCHEDULE OF VALUES



## ADDING A NEW SCHEDULE ITEM

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

Actions	s <b>v</b>	<b>(</b> NE	ITEMS	SCHEDULE OF VALUES
(  e )	ľ			Go to Schedule ID

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	\$0.0
WBS code	Hide in plan and progress
	YES
Custom list 1	Custom list 2

## SCHEDULE OF VALUES REGISTER



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#### **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.

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#### QUICK GUIDE

# **SCHEDULE OF VALUES**



### 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 item** 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.

osted date 3/20/2023	e 3		Ť.														
aim multij	ple actuals:												4	Search			
Action	Schedule item ID	Ŧ	Description	Ŧ	Schedule quantity	Ŧ	UoM	Ŧ	Quantity claimed (to date)	Ŧ	Value claimed (to date)	Ŧ	Claimed quantity	Ŧ	Claimed value	Ŧ	Note
Θ	2		Slab 1 Pour			3900	SF			0		0				\$0.00	
Θ	3		Slab 1 Concrete			255	Cubic Y	(a		0		0				\$0.00	
Θ	4		Slab 1 Rebar			2	Ton			0		0				\$0.00	

- 5. You can save this as a template to use later by clicking the **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.

Work completed from     •Work completed through       month/day/year     month/day/year       rogress estimate number     Progress estimate billing period       innt: Type: 1234     month year	*Description			
month/day/year     month/day/year       Progress estimate number     Progress estimate billing period       innt: Type: 1234     month year	*Work completed from		*Work completed through	
Progress estimate number Progress estimate billing period month year	month/day/year	***	month/day/year	ť
tint: Type: 1234	Progress estimate number		Progress estimate billing period	
lint: Type: 1234			month year	E
	Hint: Type: 1234			
comments	Comments			

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



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