

PAYMENT APPLICATIONS

ProjectTeam.com allows you to easily create and manage all of your Payment Applications in one system. The first step in creating a new Payment Application is to choose an existing Contract, and therefore, can only be created after a contract has been established. Payment applications allow you to bill against Schedule of Value items in your Contract and Change Orders associated with that contract.

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CREATE A PAYMENT APPLICATION

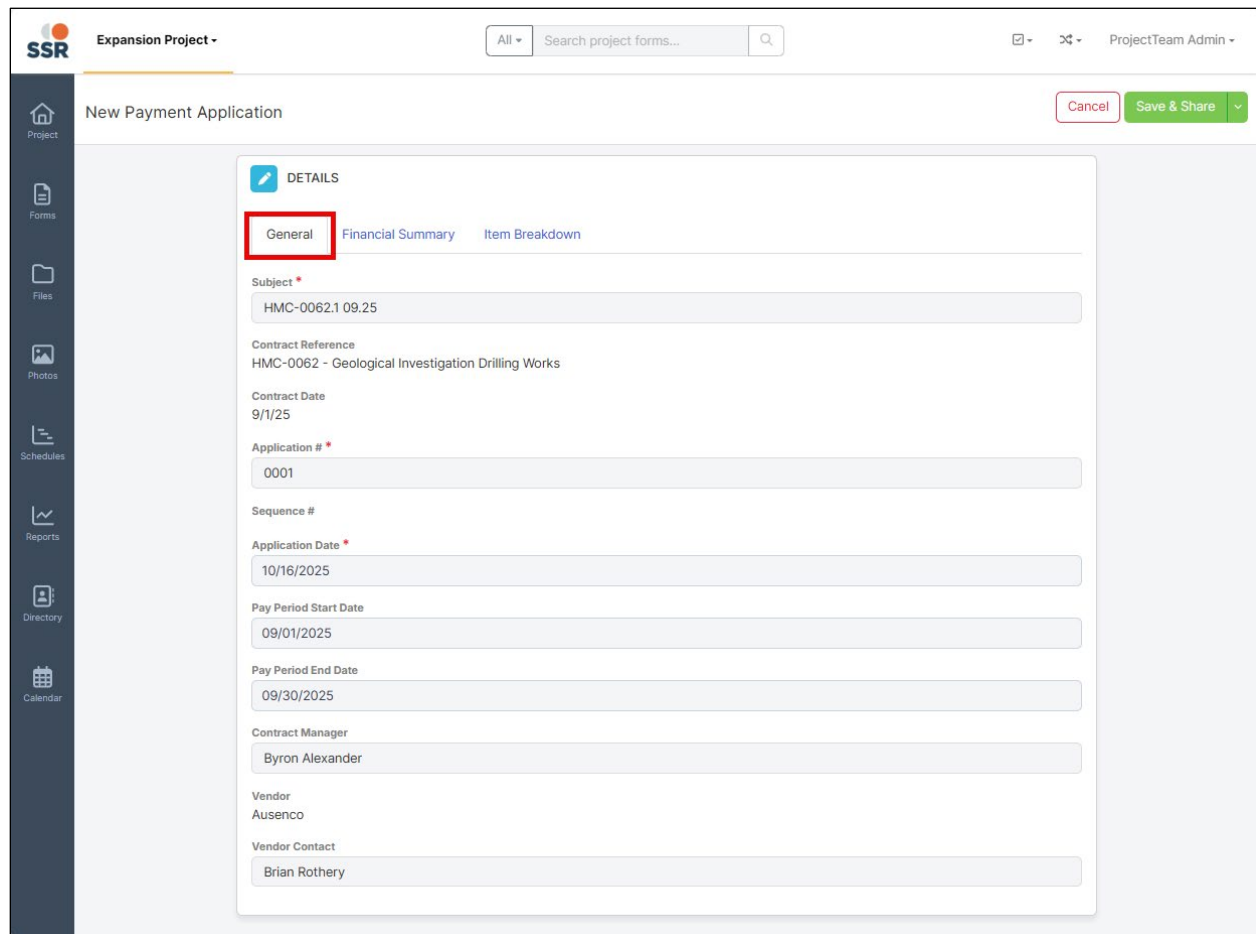
- 1) Click the **New** button to create a new Payment Application.

Payment Applications shared with me							New	Print	...
☐	Subject ↑↓	Contract Reference ↑↓	Application # ↑↓	Total Completed Work ↑↓	Current Payment Due ↑↓	Created On ↑↓	Related	Shared	
☐	GEOLOGICAL INVESTIGATION Pay App 001	HMC-0062 - Geological Investigation Drilling Works	0001	\$667,500.00	\$667,500.00	9/25/25 8:16 AM			

- 2) From the Choose Contract modal, select the radio button next to the Contract from which you would like to create your Payment Application for. Click the **Choose Contract** button.

Choose Contract					
Contract # ↑↓	Subject ↑↓	Vendor (Recommended/Awarded) ↑↓	Type ↑↓	Unit Price Contract ↑↓	
☐	HMC-451	Training Center Rental and Fitout Works Agreement/ HMC-0450 V2	Doğa Denetim İş Sağ. Güv. Eğit. Ve Danış. Hiz. A.Ş. (Doğa HSE)	Subcontract	☒
☐	48573	Steel Erection		Subcontract	☒
☐	HMC-0422	Ausenco Engineering	Ausenco	Contract	☒
☒	HMC-0062	Geological Investigation Drilling Works	Ausenco	Contract	☒
Cancel				Choose Contract	

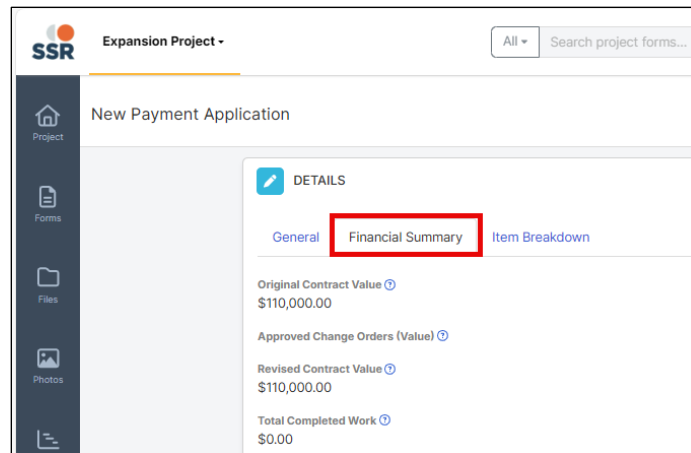
- 3) In the **General** tab, fill in the required fields: **Subject**, **Application Date**, and any other applicable field.



The screenshot shows the 'New Payment Application' form in the ProjectTeam system. The 'General' tab is selected and highlighted with a red box. The form contains the following fields:

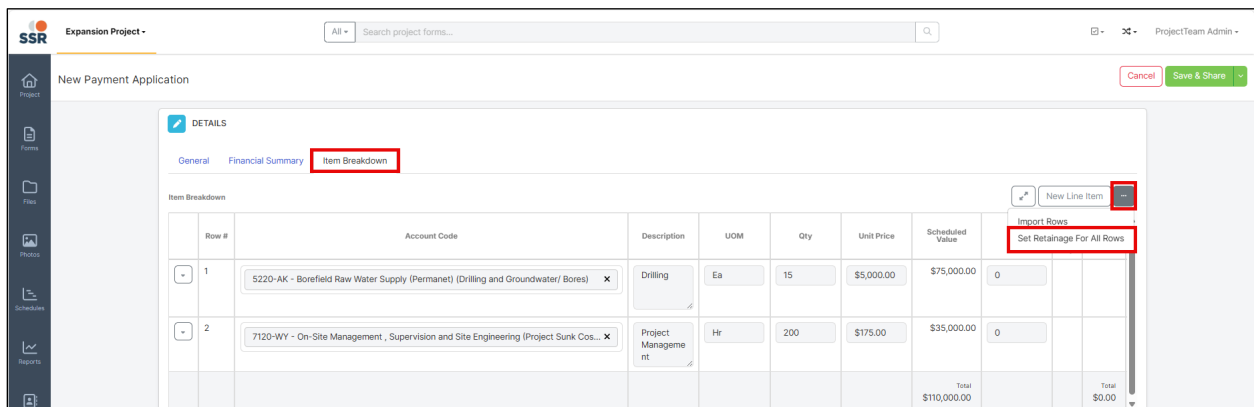
- Subject ***: HMC-0062.1 09.25
- Contract Reference**: HMC-0062 - Geological Investigation Drilling Works
- Contract Date**: 9/1/25
- Application # ***: 0001
- Sequence #**: (empty)
- Application Date ***: 10/16/2025
- Pay Period Start Date**: 09/01/2025
- Pay Period End Date**: 09/30/2025
- Contract Manager**: Byron Alexander
- Vendor**: Ausenco
- Vendor Contact**: Brian Rothery

- 5) **Financial Summary**: All fields on the Financial Summary tab are read-only and are populated from other areas of the system. Most of the information comes from the Item Breakdown tab, but you will also find information from the related Contract and Change Orders.



**Hover over the blue question mark to learn more information about that field.

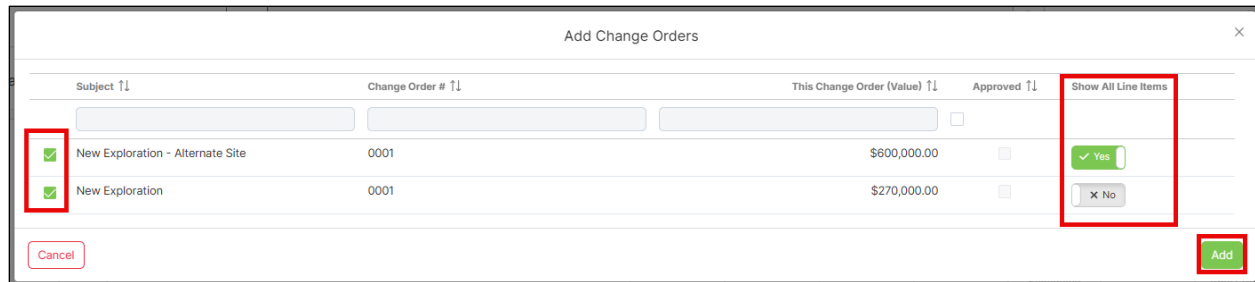
- 6) **Item Breakdown:** By default, the Item Breakdown will automatically populate from the Schedule of Values contained in the Contracts form. If needed, you can further break down the cost contained in the initial upload.
- 7) **Set Retainage** by clicking the 3-dot ellipsis at the top of the collection and selecting Set Retainage for All Rows.



Row #	Account Code	Description	UOM	Qty	Unit Price	Scheduled Value	Import Rows
1	5220-AK - Borefield Raw Water Supply (Permanent) (Drilling and Groundwater/ Bores)	Drilling	Ea	15	\$5,000.00	\$75,000.00	0
2	7120-WY - On-Site Management, Supervision and Site Engineering (Project Sunk Cos...)	Project Management	Hr	200	\$175.00	\$35,000.00	0
Total						\$110,000.00	\$0.00

- a. Enter the **Work** and **Material Retainage Percents**.
- b. **Apply**.

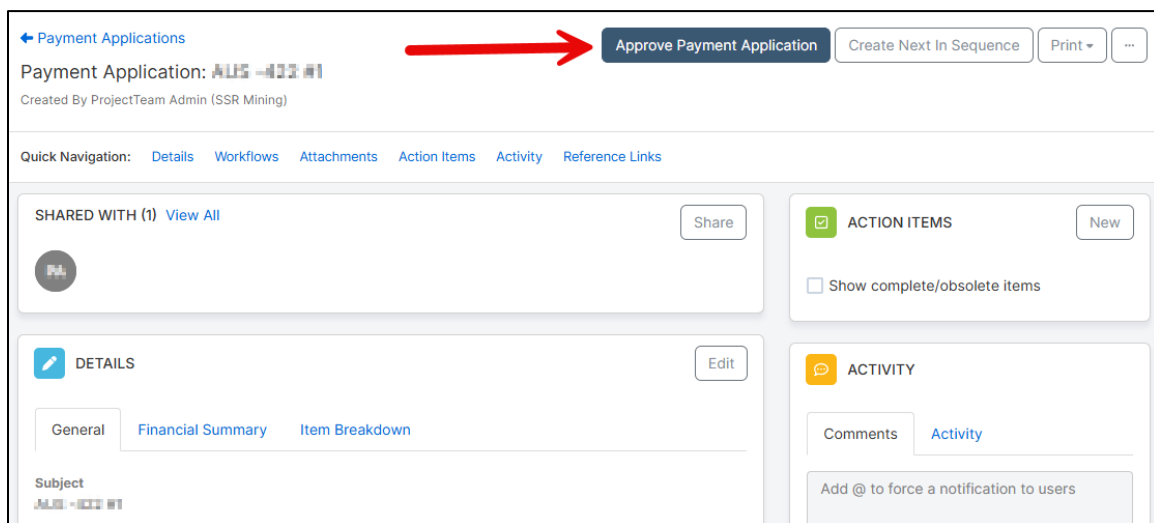
- e. **Show All Line Items:** Choose **Yes** to show all of the line items in the Change Order or **No** to show one line item with the total amount.
- f. **Add.**



- g. Repeat **Steps 8-10** for the Change Order rows.

APPROVING THE PAYMENT APPLICATION

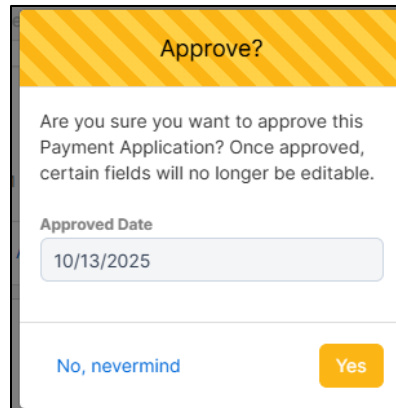
Once you have recorded all the needed information and you do not want the Payment Application to be changed anymore, you can approve it. To approve the Payment Application, click the Approve Payment Application button on top of the form in view mode.



Clicking the Approve Payment Application button will bring up a confirmation modal. The confirmation modal notifies the user that after marking the form final and saving, certain fields will be locked and no additional changes can be made to the Payment Application. Those fields include:

- 1) Application Date
- 2) Cost Period
- 3) Item Breakdown (collection)

In the confirmation modal, you are required to add an "Approved Date". Choose the date that the Payment Application was approved from the calendar picker field. Once complete, click "Yes" to approve and lock the Payment.

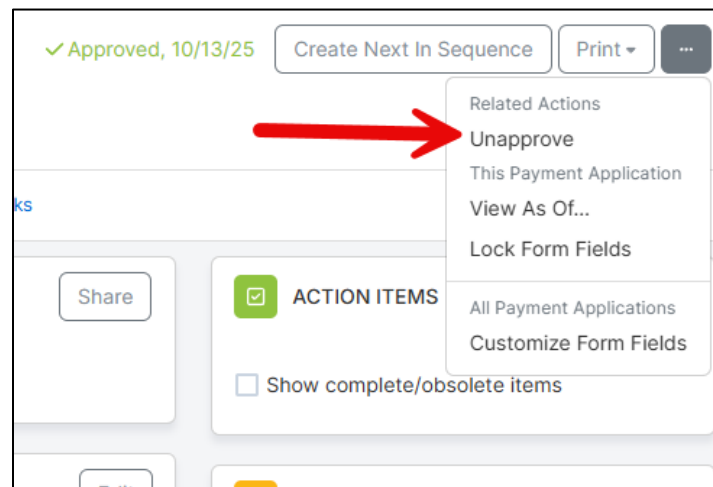


The screenshot shows a confirmation modal titled "Approve?". It contains the text: "Are you sure you want to approve this Payment Application? Once approved, certain fields will no longer be editable." Below this is a field for "Approved Date" with the value "10/13/2025". At the bottom, there are two buttons: "No, nevermind" and "Yes".

UNAPPROVING THE PAYMENT APPLICATION

**Note: Only Project Administrators can unapprove forms.*

If there has been a mistake and the Payment Application was marked "Approved" prematurely, your Project Administrator can unapprove it to edit again. To unapprove, click the options (...) button on the top right of the Payment Application form in view mode. In the "Related Actions" section of the dropdown, click the Unapprove option.



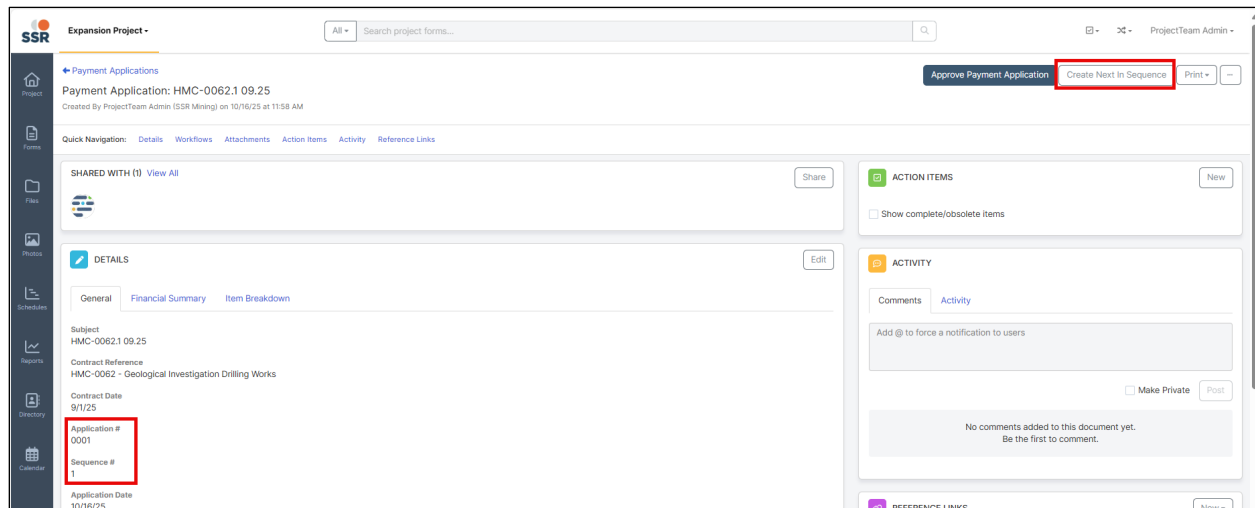
The screenshot shows a payment application form in view mode. At the top, it says "✓ Approved, 10/13/25". To the right are buttons for "Create Next In Sequence", "Print", and a three-dot menu button. A red arrow points to the three-dot menu, which is open, showing a "Related Actions" section with the "Unapprove" option highlighted. Other options in the dropdown include "This Payment Application", "View As Of...", "Lock Form Fields", "All Payment Applications", and "Customize Form Fields". Below the dropdown is an "ACTION ITEMS" section with a checkbox for "Show complete/obsolete items".

Note: You can only unapprove the Payment Application that is the latest in its sequence. For example, if you have Pay Apps 1, 2, and 3, and all have been approved, to unapprove 2, you would need to first unapprove 3.

CREATE THE NEXT PAYMENT APPLICATION

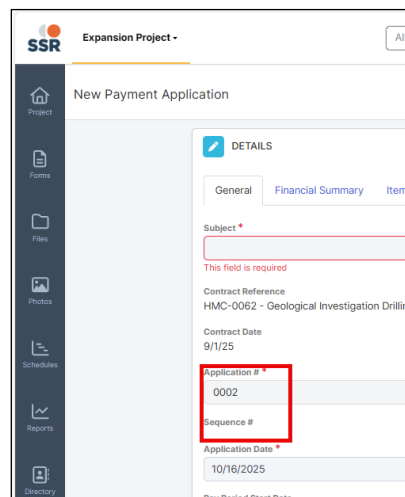
Once you have create the Pay App for a Contract, you can create the next sequential Pay App from the latest in the sequence.

- 1) Open the latest Pay App.
- 2) Click Create Next in Sequence.



The screenshot shows the 'Expansion Project' interface. The 'Payment Applications' section is active, displaying a list of applications. The 'Create Next in Sequence' button is highlighted with a red box. The 'Details' tab is selected, showing the 'Application # 0001' and 'Sequence # 1' fields, which are also highlighted with a red box.

- 3) The New Pay App will open with the next **Application #** prepopulated. Once you Save, the **Sequence #** will appear also.



The screenshot shows the 'New Payment Application' form. The 'Application #' field is prepopulated with '0002' and the 'Sequence #' field is highlighted with a red box. The 'Subject' field is required and empty, with a red error message 'This field is required'.

RELATED RESOURCES

Additional Resources:

Contracts QRG

Change Order QRG