

# QUICK GUIDE

# PAY ITEMS



## PAY ITEMS REGISTER OVERVIEW

Actions

+

×

Revenue snapshot:

Current revenue forecast

Billed date:

10/01/2015

to

08/23/2021

A↕Z

A

Actions Menu/Left Toolbar

B

Right Toolbar

Drag a column header and drop it here to group by that column

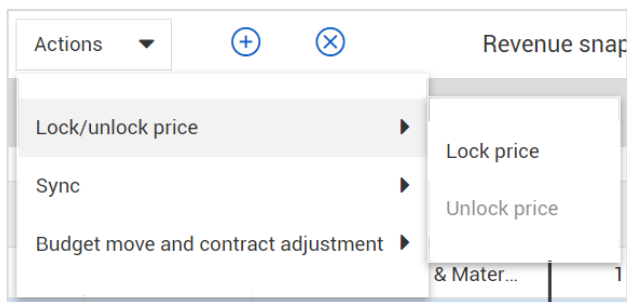
<input type="checkbox"/>	Pay item number	Description	Line num...	Row num...	Current price	Current unit price	Current pay qty	Current forecast (T/O) qty	UoM	Is billed	Current billing method
<input type="checkbox"/>	001	Earthwork - Labor & Mater...	1	1	\$ 759,887.01	\$ 759,887...	1.00	1.00	Each	<input type="checkbox"/>	Unit price
<input type="checkbox"/>	002	Concrete - Labor & Material	2	2	\$ 2,919,020.71	\$ 2,919,02...	1.00	1.00	Each	<input type="checkbox"/>	Unit price
<input type="checkbox"/>	003	Steel - Labor & Material	3	3	\$ 1,821,092.28	\$ 1,821,09...	1.00	1.00	Each	<input type="checkbox"/>	Cost plus

A  
Actions Menu/Left Toolbar

B  
Right Toolbar

### A ACTIONS MENU / LEFT TOOLBAR

Lock/unlock pay items from the Actions menu.



Add/delete pay items from the left toolbar.



### B RIGHT TOOLBAR

Contains functions for the register page you are currently viewing, including filter, import, export and search.



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# PAY ITEMS



## IMPORT PAY ITEMS FROM EXCEL

1. On the right toolbar select **Import**.



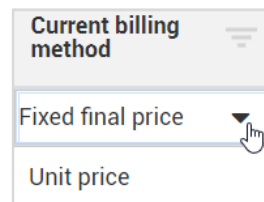
2. Browse to your Excel file and select **Open**.
3. Click **Next**.
4. Map fields for Pay item number (required), Description, billing method, pay and forecast quantities, and other columns as needed.

Control field	Mapped	File columns
Pay items		
Current billing method	✓	Current billing method
Current forecast t/o qty		Blank-do not import
Current pay qty	✓	Current pay qty
Current price	✓	Current price
Current unit price		Blank-do not import
Description	✓	Description
Line number		Blank-do not import
* Pay item number	✓	Pay item number

5. Click **Next**, then if no errors, click **Next** again.
6. Click **Import now**.

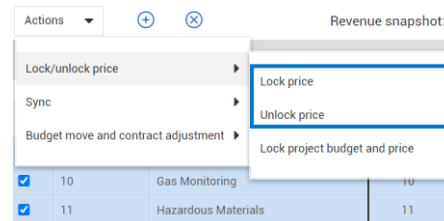
## BILLING METHODS


- ☐ **FIXED FINAL PRICE** – Lump sum contract; schedule of values with agreed upon costs the owner bills the contractor.
- ☐ **UNIT PRICE** – Billing based on quantity installed and associated billing rate.
- ☐ **COST PLUS** – True costs with agreed upon markups established to cover costs and margin of the project.




## LOCK/UNLOCK PRICE

1. Select the pay item(s) to lock or unlock.
2. Select Lock or Unlock price from the Actions menu.

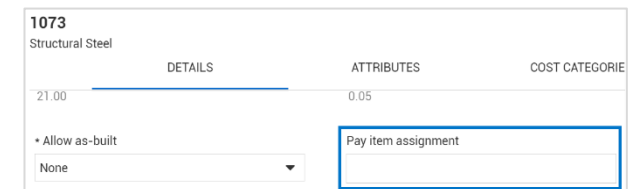


**NOTE:** The  icon indicates an unlocked pay item.

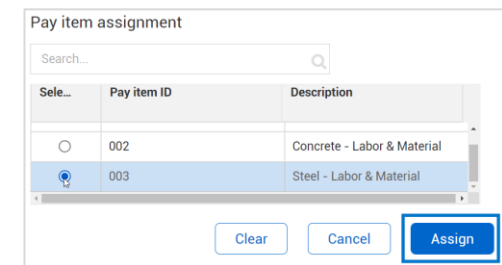
Earthwork - Labor & Mater...	 \$ 759,887...
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## ASSIGN COST ITEM TO PAY ITEM

1. On the CBS tab, right-click on the cost item and select **Cost item details**.
2. On the Details tab, click in the **Pay item assignment** field.



3. Select the pay item to assign to, then click **Assign**.



## NEED SOME MORE HELP?



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