Payapps Quick Start Guide for Subcontractors

Now you're signed up to Payapps, you've taken the first big step to making payment claims faster and easier than ever before.

In just a few more simple steps, you'll be ready to use Payapps to streamline your payment claims and save a lot of time and hassle every month.

Payapps makes the preparation and submission of payment claims much easier for subcontractors, and expedites review and approval by main contractors, including for variations and retention.

Payapps can be used to manage all your progress claims, whether your client is using Payapps or not. Note that how you use Payapps will differ if you are using it with your client (we call this "invited"), or standalone (we call this "self-managed"). Choose the scenario that applies to you below.

If you use accounting software like Xero or MYOB, it can be easily integrated with Payapps to automatically generate invoices for you. Note that the integration needs to be set up before your claim is approved in order for an invoice to be sent to Xero or MYOB. Read more at the end of this guide.

This Quick Start Guide is designed to get you up and running fast with Payapps, but we are right here if you need help at any stage. Our customer support is always free and is available from **7am–7pm AEST from Monday to Friday.**

1300 252 463   **In-app chat**   **support@payapps.com**

Invited to Payapps by your client

When you are introduced to Payapps by your client, you will receive an email from them inviting you to join Payapps. You'll need to wait until you receive this invitation email before you start using Payapps.

Once you receive the invitation, you will be able to start making payment claims in just two simple steps:

Step 1 – Sign up

Click on the invitation link to sign up to Payapps, choose your subscription tier, and set up your account. After you have completed the sign-up process, take the quick product tour of Payapps to familiarise yourself with key features.
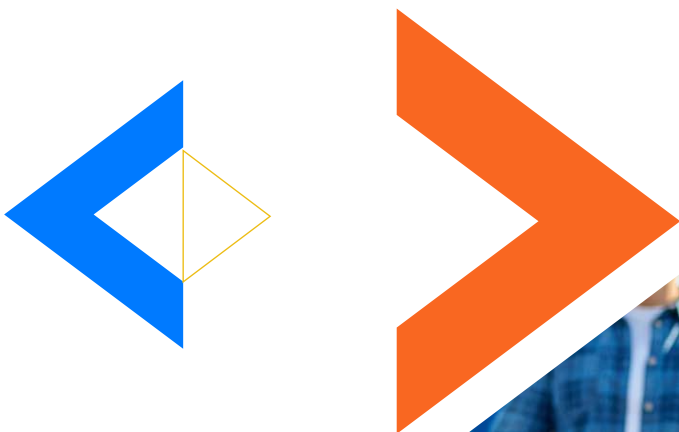
Step 2 – Add a new claim

- Go into the project and create a new claim.
- Enter the amount of work either as a percentage or dollar figure.
- Add comments and attachments to each line item if you want to provide more information or evidence to support your claim.
- Add any required compliance documents such as Subcontractor Statement, Public Liability Insurance, or Workers Compensation Insurance.
- Save and submit the claim.
- You will receive an email when your main contractor has approved your claim.

> **VISIT THE SUPPORT CENTRE ON HOW TO ADD A NEW CLAIM**

Self-managed Payapps user

Payapps can be used to streamline your payment claims, regardless of whether your client uses it. Many subcontractors use Payapps in this way, which we call self-managed, because the main contractor is not directly involved in the Payapps setup and you're in control of creating and assessing each claim.

In just five short steps, you'll be up and running and saving time preparing and submitting payment claims.

Builder approves claim and creates payment schedule/ RCTI outside of Payapps
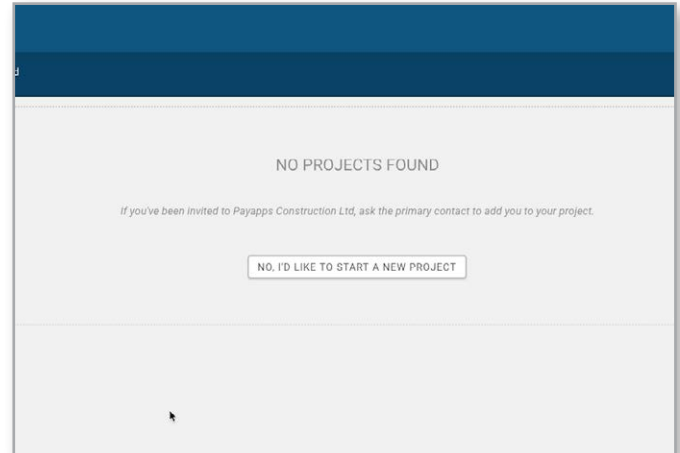
Email

Step 1 – Sign up

Sign up to Payapps and set up your account. Complete your company details, choose your subscription tier, import your logo and add any other users. After signing up to Payapps, you are led to the Projects screen.

Step 2 – Add a new Project

- Click "No, I'd like to start a new Project".
- Enter Project name, date and site address.
- Set up reminder emails.
- Set up 'permissions' in the next tab. This allows you to select members of your organisation that will have access to the project, what they can work on, and what notifications they'll receive.
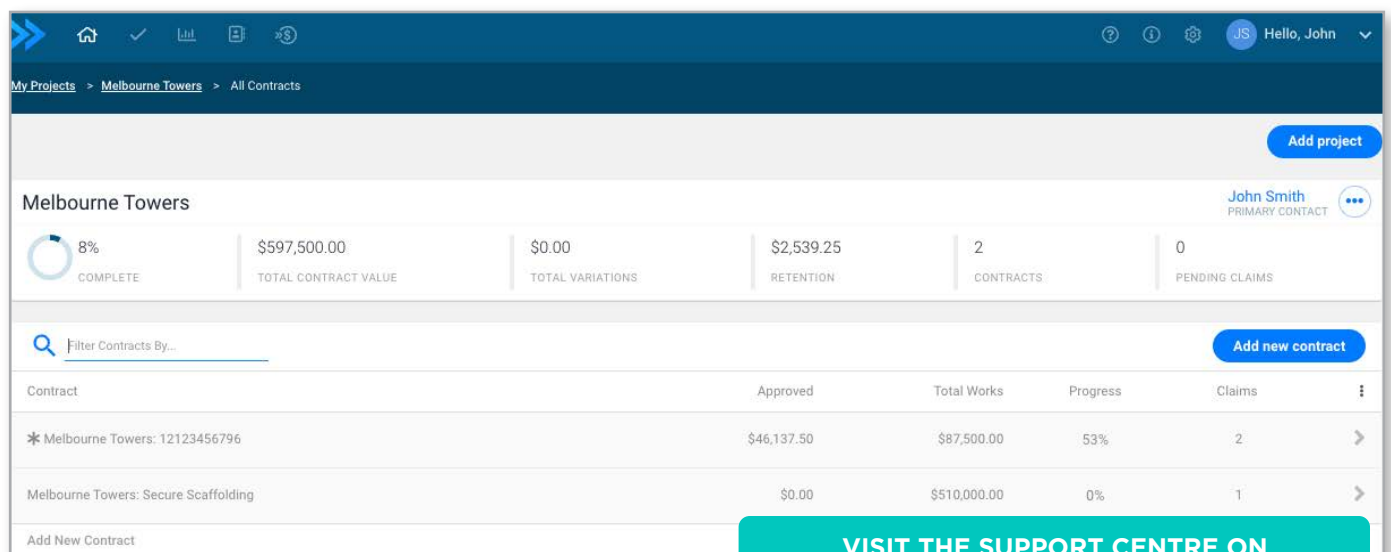
Step 3 – Add a new Contract

- Enter your company's role as 'Claimant'.
- Enter counterparty (main contractor) business name and contract name.
- Fill in the details of the counterparty company.
- Enter contract details, such as commencement date.
- Set up retention withholding details.
- You can choose to auto-send claims to your main contractor – tick on the check-box.
- Enable compliance documents for the contract.

NO PROJECTS FOUND

If you've been invited to Payapps Construction Ltd, ask the primary contact to add you to your project.

NO, I'D LIKE TO START A NEW PROJECT

VISIT THE SUPPORT CENTRE ON HOW TO ADD A NEW PROJECT

If you want to upload insurances and any other standard supporting documents to your contract, this is where you create placeholders for those documents.

- Contract breakdown can be manually entered on this page, but for detailed breakdowns you may wish to use our Excel import feature. Download "import contract template", enter your line-by-line contract details and upload the contract file to Payapps.
- Save and publish the contract.

My Projects > Melbourne Towers > All Contracts

Add project

Melbourne Towers

John Smith
PRIMARY CONTACT

8% COMPLETE	$597,500.00 TOTAL CONTRACT VALUE	$0.00 TOTAL VARIATIONS	$2,539.25 RETENTION	2 CONTRACTS	0 PENDING CLAIMS

Filter Contracts By...

Add new contract

Contract	Approved	Total Works	Progress	Claims	
✳ Melbourne Towers: 12123456796	$46,137.50	$87,500.00	53%	2	>
Melbourne Towers: Secure Scaffolding	$0.00	$510,000.00	0%	1	>
Add New Contract					

VISIT THE SUPPORT CENTRE ON HOW TO ADD A NEW CONTRACT

Step 4 – Submit a new Claim

- Enter the amount of work either as a percentage or dollar figure.
- Add comments and attachments to each line item if you want to provide more information or evidence to support your claim.
- Add any required compliance documents such as Subcontractor Statement, Public Liability Insurance, or Workers Compensation Insurance.
- Save the claim.

- Submit the claim to the main contractor. This will happen automatically if you checked the box in the contract setup page, or you can download a PDF of the claim from the Claim Details page menu and send it to the builder via email.
- The builder will assess and approve the claim and create a payment schedule/RCTI based on your agreement with them outside Payapps.

VISIT THE SUPPORT CENTRE ON HOW TO ADD A NEW CLAIM

Step 5 – Enter builder-assessed claims

On the contract page, there are two buttons:

RETRACT

this turns the claim back to draft, allowing you to edit the submitted amount and re-submit the claim if required.

ASSESS

brings up the claim for you as the Approver. This allows you to edit and approve the claim per feedback you have received from your main contractor.

• If your client has made changes to your original claim, alter the amounts as required. This requires a modification reason that can be entered by selecting the red speech bubble on the right side of the line.

• Check the Retention Tab to change retention amounts.

READ OUR HELP ARTICLE ON HOW TO ENTER BUILDER-ASSESSED CLAIMS

Integrating Payapps with Xero and MYOB

Payapps offers flexible integration with Xero and MYOB, based on when you need to recognise revenue. This is applicable whether you use Payapps with your main contractor/builder or self-managed.

Payapps can be configured to generate an invoice either at:

• Submission of your payment claim: if the invoice is needed with the claim to be paid on time.

• Approval of your payment claim (Recommended): if you want to wait for the respondent's assessment to confirm the final amount before you invoice.

These articles will help you integrate Payapps with your financial software:

INTEGRATE WITH XERO

xero

INTEGRATE WITH MYOB

myob