

Application for Payment

by Landmark Data Systems, Inc.

Save time while preparing your payment applications! Landmark's Application for Payment program makes it easy for you to submit applications in a timely and accurate manner, and it offers the convenience of preparing applications for both AIA and non-AIA jobs.

Overview

Use Application for Payment to create lists of your customers, jobs, schedules of values and change orders. Once these lists are in place, the program

- ✓ Quickly and accurately **calculates** your application
- ✓ **Prints** on AIA G702/G703 forms AND standard applications on plain paper
- ✓ **Remembers** figures from previous applications for use in subsequent draws

The program is networkable and has multi-company capabilities. A built-in backup system makes it easy for you to backup and restore your data as often as you wish.

Features

- ✓ Maintains a unique schedule of values for each job
- ✓ Allows tracking of approved and pending change orders by having a change order status of active or pending
- ✓ Allows you to attach free-form notes to customers, jobs, change orders and schedule data
- ✓ Works in percentages or dollar amounts, and rounds to the nearest dollar or cents selectable by job
- ✓ Prints worksheet to aid in preparation of an application
- ✓ Adjusts retainage during job's progress
- ✓ Handles materials as either stored or transfers to previous billings selectable by job
- ✓ Automatically transfers current application to previous when creating a new application
- ✓ Immediately recalculates the entire application when any change is made
- ✓ Bills 100 percent completion in a single step
- ✓ Bills final retainage in a single step
- ✓ Allows review and changes by keeping each application request in detail
- ✓ Previews and prints reports as many times as needed before printing the final draft
- ✓ Automatically prints notary data on each format, if desired
- ✓ Contains a user-definable application statement in the plain paper format

Price: \$395

Landmark accepts Visa, MasterCard, UPS COD and prepaid orders.

www.landmarkdata.com

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How the Program Works

Create tables of your customers, jobs, schedules of values and change orders using the Master Lists. In these lists you can record information such as retainage percentages, AIA requirements, project descriptions, architectural information, line item descriptions and figures and other important data.

Job List

The screenshot shows the 'Master Lists' application with the 'Jobs' tab selected. A list of jobs is displayed on the left, with job 1003 highlighted. The right pane shows details for job 1003:

- Job:** 1003
- Job Name:** Spring Valley Branch - Metro Bank
- Customer ID:** Metro
- Project Address:** 4621 First Street, Spring Valley, GA 89009
- Project Description:** Metro Bank - Spring Valley Branch
- Architect:** Mark Goodson
- Application for Payment:**
 - Required?
 - Application Format:** AIA 702/703 Forms
 - Work Retainage:** 10.00
 - Architect's Project Number:** 456A276-1299-0
 - Material Retainage:** 10.00
 - Display amounts in whole dollars?
 - Move stored material to previous?

Schedule of Values

The screenshot shows the 'Master Lists' application with the 'Schedule of Values' tab selected. The interface displays the following data for job 1002:

LINE	TITLE	SCHEDULE
31	Concrete Fill Labor	56,100
32	Structural Steel Material	6,400
33	Structural Steel Labor	3,500
34	Rough Carpentry Material	2,800
35	Rough Carpentry Labor	2,000
36	Millwork Material	33,000
37	Millwork Labor	4,000
38	Joint Sealer Material	1,000
39	Joint Sealer Labor	1,000
40	Firestopping Material	5,000
41	Firestopping Labor	6,500
42	Wood Door Material	2,000
43	Wood Door Labor	1,400
44	Metal Drs/Frms Material	8,900
45	Metal Drs/Frms Labor	3,600
46	Entrances Material	1,600
47	Entrances Labor	1,600
48	Finish Hardware	5,600
49	Drywall Material	11,650
		\$1,716,050

You have the option of printing a worksheet that will assist you in preparing your applications. The worksheet has columns for you to manually record "New Work Complete," "New Material Complete" and "Per Cent" before these figures are entered into the computer.

WELBORN CONSULTING, INC.
AIA WORKSHEET

Job: 1002 Shelby County Correctional Facility Work complete through application # 3

ITEM NO	DESCRIPTION OF WORK	SCHEDULED VALUE	WORK COMPLETE	MATERIAL STORED	TOTAL COMPLETE	PER CENT	NEW WORK COMPLETE	NEW STORED MATERIAL	PER CENT
1	Bond	15,300	15,300		15,300	100			
2	Insurance	3,700	3,700		3,700	100			
3	Sales Tax	59,800	59,800		59,800	100			
4	Supervision	73,000	10,950		10,950	15			
5	General Requirements	72,000	10,800		10,800	15			
6	Equipment	25,900	5,900		5,900	23			
7	Final Clean Up	8,600							
8	Earthwork	64,200	52,510		52,510	82			
9	Soil Treatment	4,300	4,300		4,300	100			
10	Sidewalk Material	3,200							
11	Sidewalk Labor	4,100							
12	Concrete Paving Material	7,700							
13	Concrete Paving Labor	7,400							
14	Curb Material	2,100							
15	Curb Labor	900							
16	Seed/Fertilizer Material	2,400							
17	Seed/Fertilizer Labor	4,300							

Prepare new applications and alter existing applications using the Draw screen. The Draw screen adjusts retainage during a job's progress; automatically calculates "Per Cent" once "Work Complete" is entered and vice versa; automatically recalculates the application when any changes are entered; bills final retainage and 100% completion in a single step; and rounds to the nearest dollar or cents.

Application

Select Job/Application Job Name: Customer:

Job: App# 10/20/2000 to 10/20/2000 Project Description:

Total Contract	1,716,050
Total To Date	424,625
Total Retainage	42,463
Previous Certificates	
Due This Application	382,162
Contract Balance	1,291,425

Application New Appl Retainage Bill 100% Line Detail Help Tips Close

LINE NO	DESCRIPTION OF WORK	SCHEDULED VALUE	PREVIOUS APPLICATIONS	WORK THIS PERIOD	MATERIAL STORED	TOTAL COMPL AND STORED	PER CENT	BALANCE TO FINISH	RETAINAGE
1	Bond	15,300		15,300		15,300	100.00		1,530
2	Insurance	3,700		3,700		3,700	100.00		370
3	Sales Tax	59,800		59,800		59,800	100.00		5,980
4	Supervision	73,000		10,950		10,950	15.00	62,050	1,095
5	General Requirements	72,000		10,800		10,800	15.00	61,200	1,080
6	Equipment	25,900		5,900		5,900	22.78	20,000	590
7	Final Clean Up	8,600					.00	8,600	
8	Earthwork	64,200		52,510		52,510	81.79	11,690	5,251
9	Soil Treatment	4,300		4,300		4,300	100.00		430
10	Sidewalk Material	3,200					.00	3,200	
11	Sidewalk Labor	4,100					.00	4,100	
12	Concrete Paving Material	7,700					.00	7,700	
13	Concrete Paving Labor	7,400					.00	7,400	
14	Curb Material	2,100					.00	2,100	
15	Curb Labor	900					.00	900	
16	Seed/Fertilizer Material	2,400					.00	2,400	
17	Seed/Fertilizer Labor	4,300					.00	4,300	
		\$1,716,050	\$0	\$414,260	\$10,365	\$424,625	24.74	\$1,291,425	\$42,463

You can print your applications on AIA G702 and 703 forms, or you can print a standard application form on plain paper. The standard application prints a cover sheet and a detail sheet and is equipped with a user definable application statement.

Standard Application Cover Sheet

Standard Application Detail Sheet

APPLICATION FOR PAYMENT		Page 1 of 5									
NO. 0280-COUNTY COURTHOUSE 80 N. 30th St. Madison, LA 70501	Project: 0280-COUNTY COURTHOUSE 113-Courthouse One Madison, LA 70541	Application No.: 0 Application Date: 10/21/2000	Period From: 10/26/2000 To: 10/26/2000								
FROM: MICHAEL CONSTRUCTION, INC. 1224 1st Avenue Amherst, USA 5076	Contract No.: 0280-0001 Contract Date:										
APPLICATION RECONCILIATION		CHANGE ORDER SUMMARY									
Original Contract 88,000 Net Change by Change Order 85,000 Contract Total to Date 1,768,000 Total Completed and Billed to Date 425,000 Retainage: 10.00% of Completed Work 42,500 10.00% of Total Billed to Date 1,325 Less Total Retainage 43,825 Total if and Less Retainage 381,175 LAST PAYMENT CERTIFICATE Contract Payment Due 86,825 Balance of Contract 1,386,825	<table border="1"> <thead> <tr> <th>ADDITIONS</th> <th>DEDUCTIONS</th> </tr> </thead> <tbody> <tr> <td>Total Approved Previous</td> <td>15,000</td> </tr> <tr> <td>Total Approved This Month</td> <td>80,000</td> </tr> <tr> <td>Totals</td> <td>95,000</td> </tr> <tr> <td>Net Changes</td> <td>80,000</td> </tr> </tbody> </table> <p>The undersigned Contractor certifies that to the best of the Contractor's knowledge, information and belief the facts stated in this application for payment has been completed in accordance with the contract documents, that all amounts have been paid to the contractor by owner for which payment CERTIFIED BY OWNER will be made and that the Contractor is not in default of any obligations under the contract, and that current payment shown herein is accurate.</p> <p>For _____ Date: _____ Michael Construction, Inc. State or Job _____ If work is in progress _____ Title (Print and sign) and before the 21st day of October 2000</p> <p>Witness: Public: Michael C. Smith My Commission Expires: 10/31/2000</p>	ADDITIONS	DEDUCTIONS	Total Approved Previous	15,000	Total Approved This Month	80,000	Totals	95,000	Net Changes	80,000
ADDITIONS	DEDUCTIONS										
Total Approved Previous	15,000										
Total Approved This Month	80,000										
Totals	95,000										
Net Changes	80,000										

SCHEDULE OF VALUES		Application 0		Application No. 0010000		Project No. 0280-0001		Page 2 of 5	
LINE	DESCRIPTION OF WORK	SCHEDULED VALUE	PREVIOUS APPLICATIONS	WORK THIS PERIOD	APPROVED THIS PERIOD	TOTAL COMPLETED TO DATE	PCT	BALANCE TO COMPLETE	RETAINAGE
1	Rest	8,000		8,000		8,000	100		1,000
2	Roofing	3,750		3,750		3,750	100		370
3	Site Exp	88,000		88,000		88,000	100		8,800
4	Excavation	70,000		70,000		70,000	100		7,000
5	General Excavation	20,000		20,000		20,000	100		2,000
6	Foundation	8,000		8,000		8,000	100		800
7	Foundation	14,000		14,000		14,000	100		1,400
8	Foundation	14,000		14,000		14,000	100		1,400
9	Foundation	14,000		14,000		14,000	100		1,400
10	Foundation	14,000		14,000		14,000	100		1,400
11	Foundation	14,000		14,000		14,000	100		1,400
12	Foundation	14,000		14,000		14,000	100		1,400
13	Foundation	14,000		14,000		14,000	100		1,400
14	Foundation	14,000		14,000		14,000	100		1,400
15	Foundation	14,000		14,000		14,000	100		1,400
16	Foundation	14,000		14,000		14,000	100		1,400
17	Foundation	14,000		14,000		14,000	100		1,400
18	Foundation	14,000		14,000		14,000	100		1,400
19	Foundation	14,000		14,000		14,000	100		1,400
20	Foundation	14,000		14,000		14,000	100		1,400
21	Foundation	14,000		14,000		14,000	100		1,400
22	Foundation	14,000		14,000		14,000	100		1,400
23	Foundation	14,000		14,000		14,000	100		1,400
24	Foundation	14,000		14,000		14,000	100		1,400
25	Foundation	14,000		14,000		14,000	100		1,400
26	Foundation	14,000		14,000		14,000	100		1,400
27	Foundation	14,000		14,000		14,000	100		1,400
28	Foundation	14,000		14,000		14,000	100		1,400
29	Foundation	14,000		14,000		14,000	100		1,400
30	Foundation	14,000		14,000		14,000	100		1,400
31	Foundation	14,000		14,000		14,000	100		1,400
32	Foundation	14,000		14,000		14,000	100		1,400
33	Foundation	14,000		14,000		14,000	100		1,400
34	Foundation	14,000		14,000		14,000	100		1,400
35	Foundation	14,000		14,000		14,000	100		1,400
36	Foundation	14,000		14,000		14,000	100		1,400
37	Foundation	14,000		14,000		14,000	100		1,400
38	Foundation	14,000		14,000		14,000	100		1,400
39	Foundation	14,000		14,000		14,000	100		1,400
40	Foundation	14,000		14,000		14,000	100		1,400
41	Foundation	14,000		14,000		14,000	100		1,400
42	Foundation	14,000		14,000		14,000	100		1,400
43	Foundation	14,000		14,000		14,000	100		1,400
44	Foundation	14,000		14,000		14,000	100		1,400
45	Foundation	14,000		14,000		14,000	100		1,400
46	Foundation	14,000		14,000		14,000	100		1,400
47	Foundation	14,000		14,000		14,000	100		1,400
48	Foundation	14,000		14,000		14,000	100		1,400
49	Foundation	14,000		14,000		14,000	100		1,400
50	Foundation	14,000		14,000		14,000	100		1,400
51	Foundation	14,000		14,000		14,000	100		1,400
52	Foundation	14,000		14,000		14,000	100		1,400
53	Foundation	14,000		14,000		14,000	100		1,400
54	Foundation	14,000		14,000		14,000	100		1,400
55	Foundation	14,000		14,000		14,000	100		1,400
56	Foundation	14,000		14,000		14,000	100		1,400
57	Foundation	14,000		14,000		14,000	100		1,400
58	Foundation	14,000		14,000		14,000	100		1,400
59	Foundation	14,000		14,000		14,000	100		1,400
60	Foundation	14,000		14,000		14,000	100		1,400
61	Foundation	14,000		14,000		14,000	100		1,400
62	Foundation	14,000		14,000		14,000	100		1,400
63	Foundation	14,000		14,000		14,000	100		1,400
64	Foundation	14,000		14,000		14,000	100		1,400
65	Foundation	14,000		14,000		14,000	100		1,400
66	Foundation	14,000		14,000		14,000	100		1,400
67	Foundation	14,000		14,000		14,000	100		1,400
68	Foundation	14,000		14,000		14,000	100		1,400
69	Foundation	14,000		14,000		14,000	100		1,400
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73	Foundation	14,000		14,000		14,000	100		1,400
74	Foundation	14,000		14,000		14,000	100		1,400
75	Foundation	14,000		14,000		14,000	100		1,400
76	Foundation	14,000		14,000		14,000	100		1,400
77	Foundation	14,000		14,000		14,000	100		1,400
78	Foundation	14,000		14,000		14,000	100		1,400
79	Foundation	14,000		14,000		14,000	100		1,400
80	Foundation	14,000		14,000		14,000	100		1,400
81	Foundation	14,000		14,000		14,000	100		1,400
82	Foundation	14,000		14,000		14,000	100		1,400
83	Foundation	14,000		14,000		14,000	100		1,400
84	Foundation	14,000		14,000		14,000	100		1,400
85	Foundation	14,000		14,000		14,000	100		1,400
86	Foundation	14,000		14,000		14,000	100		1,400
87	Foundation	14,000		14,000		14,000	100		1,400
88	Foundation	14,000		14,000		14,000	100		1,400
89	Foundation	14,000		14,000		14,000	100		1,400
90	Foundation	14,000		14,000		14,000	100		1,400
91	Foundation	14,000		14,000		14,000	100		1,400
92	Foundation	14,000		14,000		14,000	100		1,400
93	Foundation	14,000		14,000		14,000	100		1,400
94	Foundation	14,000		14,000		14,000	100		1,400
95	Foundation	14,000		14,000		14,000	100		1,400
96	Foundation	14,000		14,000		14,000	100		1,400
97	Foundation	14,000		14,000		14,000	100		1,400
98	Foundation	14,000		14,000		14,000	100		1,400
99	Foundation	14,000		14,000		14,000	100		1,400
100	Foundation	14,000		14,000		14,000	100		1,400
101	Foundation	14,000		14,000		14,000	100		1,400
102	Foundation	14,000		14,000		14,000	100		1,400
103	Foundation	14,000		14,000		14,000	100		1,400
104	Foundation	14,000		14,000		14,000	100		1,400
105	Foundation	14,000		14,000		14,000	100		1,400
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108	Foundation	14,000		14,000		14,000	100		1,400
109	Foundation	14,000		14,000		14,000	100		1,400
110	Foundation	14,000		14,000		14,000	100		1,400
111	Foundation	14,000		14,000		14,000	100		1,400
112	Foundation	14,000		14,000		14,000	100		1,400
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114	Foundation	14,000		14,000		14,000	100		1,400
115	Foundation	14,000		14,000		14,000	100		1,400
116	Foundation	14,000		14,000		14,000	100		1,400
117	Foundation	14,000		14,000		14,000	100		1,400
118	Foundation	14,000		14,000		14,000	100		1,400
119	Foundation	14,000		14,000		14,000	100		1,400
120	Foundation	14,000		14,000		14,000	100		1,400
121	Foundation	14,000		14,000		14,000	100		1,400
122	Foundation	14,000		14,000		14,000	100		1,400
123	Foundation	14,000		14,000		14,000	100		1,400
124	Foundation	14,000		14,000		14,000	100		1,400
125	Foundation	14,000		14,000		14,000	100		1,400
126	Foundation	14,000		14,000		14,000	100		1,400
127	Foundation	14,000		14,000		14,000	100		1,400
128	Foundation	14,000		14,000		14,000	100		1,400
129	Foundation	14,000		14,000		14,000	100		1,400
130	Foundation	14,000		14,000		14,000	100		1,400
131	Foundation	14,000		14,000		14,000	100		1,400
132	Foundation	14,000		14,000		14,000	100		1,400
133	Foundation	14,000		14,000		14,000	100		1,400
134	Foundation	14,000		14,000		14,000	100		1,400
135	Foundation	14,000							