

## EZBUILD GUIDELINES FOR DESIGN PROFESSIONAL INVOICES

1. Go to ezbuild Customer Login screen: <https://ezbuild.fpm.iastate.edu>
  - a. Sign in using the logon ID and Password emailed to you by the system. If you have forgotten it, your Project Administrator can email it to you.
2. Go to the "My Profile" tab for your initial logon
  - a. Change your password but do not enter your payment information
  - b. Verify your Profile information and click the Save button
  - c. Ignore the Payment Profile button and the Agreement button
3. Go back to the "Current Activity" tab
  - a. Find the project for which you are invoicing and expand with the plus sign
  - b. Check the Action column for an orange exclamation mark to be sure it is in your court for processing. Ball in Court column will say Originator and you will not be able to enter work completed if it does not.
  - c. Click the underlined name of your firm
  - d. Go to the "Schedule of Values" tab and a new window opens
  - e. Click the Create/Edit Draw Request button and a new window opens
    - i. Expand All or expand with the 'plus' sign by the line item you choose
    - ii. Highlight the first line item (the line with dollar amount) for which you wish to claim payment
    - iii. In the boxes above and to the left, fill in \$ amount or % completed for this time period
    - iv. Click the Save button after each line item
    - v. Proceed through all line items you wish to update
    - vi. Click the SAVE & CLOSE box at the top right
      1. Documentation for Hourly Billing or Reimbursables must be attached to the pay request by clicking the "Documentation" tab at the top. Do **not** attach anything for Stipulated Sum billing unless there are Reimbursables.
      2. Click File Upload button and Browse for your document
      3. Select 'This application for pay only' and Upload
      4. A list of the attached documents will show and the red 'x' beside the title will delete it
      5. You can view the attached document by clicking the underlined title
      6. You can save, close, and return to edit at any time prior to signing off
4. Select CLOSE and return to the "Contract Summary" tab
  - a. Sign off on the Pay Application by putting your password in the Sign Digitally with Design Professional box and click SIGN
  - b. The application moves into the next approver court with an email notification and continues through the approval cycle
  - c. When final signature is obtained, the invoice is processed for payment