

How to Request Waivers from Subs and Sub-Tiers



LEVELSET
Payment help is here.

Easily request and collect lien waivers from your subcontractors, suppliers and subtier parties on every job.

- Step One: Navigate to a project page in Levelset and click into the AP section of the project.** You can get to a specific project page using the search bar at the top of your Levelset account, or clicking into one of the projects in your Projects list page. The AP section of the project is in grey at the top of the page.

LEVELSET | Projects

Search Projects, Documents and Contacts

Summary **AP** Contacts Documents Requests Research

Project: **JIM PLACE**
235 s pierce st Novi, MI 48374

Your Customer: **Big GC [QuickBooks-2-shipping]**
1 Test Street, Concord, Massachusetts 01720

Payable Invoices

Group By: Through Date + Add Bill

August 2019 (\$25,000.00)

Contact	Invoice #	Through Date	Amount Due	Source	Cond. Waiver	Uncond. Waiver	Status
jim company Example Sub Tier Party	--	Aug 1, 2019	\$25,000.00	--	Request	--	Not Paid

- Step Two: Request waivers from payable invoices in Levelset.** Click the green **Request** button to start a waiver request. You will only see the option to request Conditional waivers when the invoice status is Not Paid. You will see the option to request either Conditional or Unconditional waivers if the invoice status is Paid.

Payable Invoices

Group By: Through Date + Add Bill

August 2019 (\$25,000.00)

Contact	Invoice #	Through Date	Amount Due	Source	Cond. Waiver	Uncond. Waiver	Status
jim company Example Sub Tier Party	--	Aug 1, 2019	\$25,000.00	--	Request	--	Mark As Paid

3 Step Three: Choose Waiver Type. You have the option to request Partial or Final Waivers to the left of the waiver preview. Once you make a selection you can choose a different waiver template.

Let's get the info for your Waiver Next

Select Document Final Payment

Progress Payment

Partial Conditional Waiver Included Next

Michigan - Waiver

Waiver and Release

NOTICE: THIS DOCUMENT WAIVES THE CLAIMANT'S LIEN, STOP PAYMENT NOTICE, AND PAYMENT BOND RIGHTS AS SET FORTH BELOW.

Identifying Information

Name of Claimant: Levelset Contracting

Name of Customer: Big GC

Job Location: JIM PLACE, 235 s pierce st, Novi, Michigan 48374

4 Step Four: Fill Out Waiver Details. When you choose which type of waiver you want, you will see more options to **Select Template** and **Enter Document Details**.

CF EVANS TEAM should select the **CF Evans Approved template** from the dropdown menu.

Any fields that you fill in on the waiver will not be able to be modified by the document recipient.

Select Template

Partial Conditional Waiver

Enter Document Details

Leave a field blank to have the recipient fill it out.

Include Notary Acknowledgement

Select Invoices (Optional)

# --	2019-08-01	\$25,000.00	x
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Michigan Lien Waiver: "does/does not" (Optional)

Through Date (Optional)

2019-08-01

Amount of Payment Received or To Be Received (Optional)

\$ 25000.00

Next

- 4 Step Four: Require Vendor Waivers as an Attachment with the Waiver.** To require your primary sub to request vendor waivers when completing their own waiver, you can ask for Conditional Vendor Waivers or Unconditional Vendor Waivers as a required attachment. Select **Waiver Type**, **Template**, and **Through Date**, then click the **Require** button. Then click **Next**.

- 5 Step Five: Select recipients then click Send Document.** On the final step, confirm the recipient email address, then click the **Send Document** button to send the email request to your subcontractor. If you wish to save the waiver as a draft first, you can choose **Finish Later** instead.

Helpful Tip: Add an Email Note if you wish to provide additional instructions, such as "Please e-sign and return by a certain date."

6 TRACK LIEN WAIVER REQUESTS IN YOUR ACCOUNT

You can view open waiver requests in three places:

- On a specific project page, under the Requests tab of the project.
- On a specific project page, under the AP tab of the project.
- Under the Documents section of your Levelset account, in the Requests folder.

At the Request level, you can view email tracking, resend the document, or make a comment to send a second email.