Customer Education

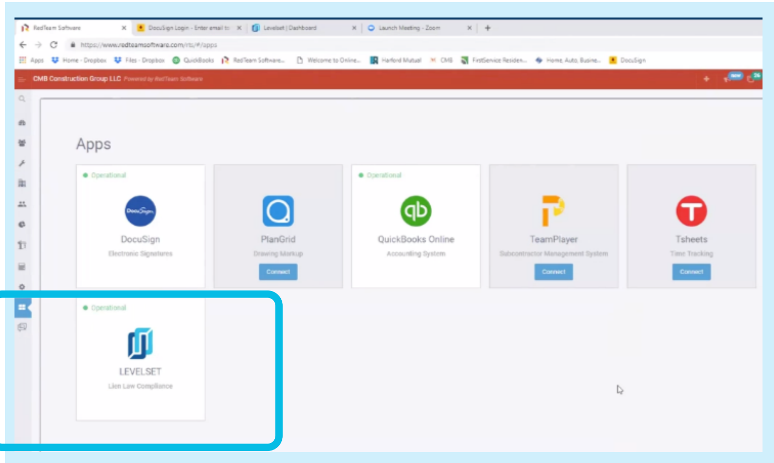
How to Sync Your RedTeam Account with Levelset and Send Waiver Requests

LEVELSET
Payment help is here.

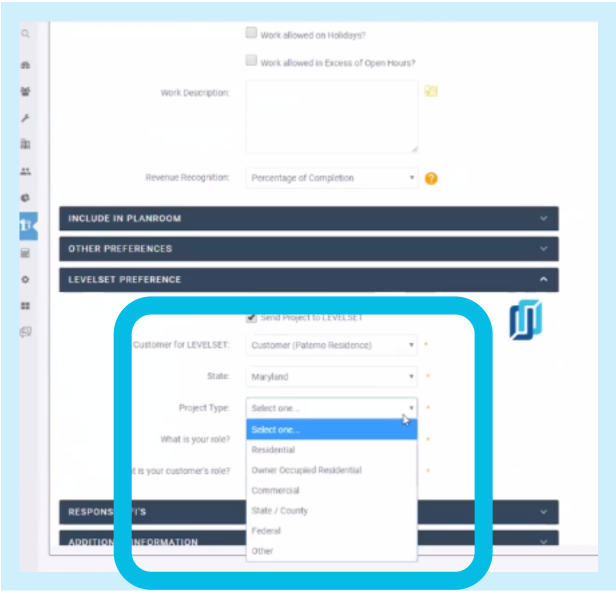
Integrate Levelset with your RedTeam account to save time with generating, tracking, and collecting lien waivers. This experience mostly takes place in your Redteam account.

Before you get started, please note- *the initial connection between Levelset and RedTeam will have to happen through RedTeam, so get in touch with your account manager there to get it set up!*

1 **Step One:** Log into both your Levelset and Redteam accounts. From the "Apps" tab in your Redteam account find Levelset on your list of apps and click **Connect**.



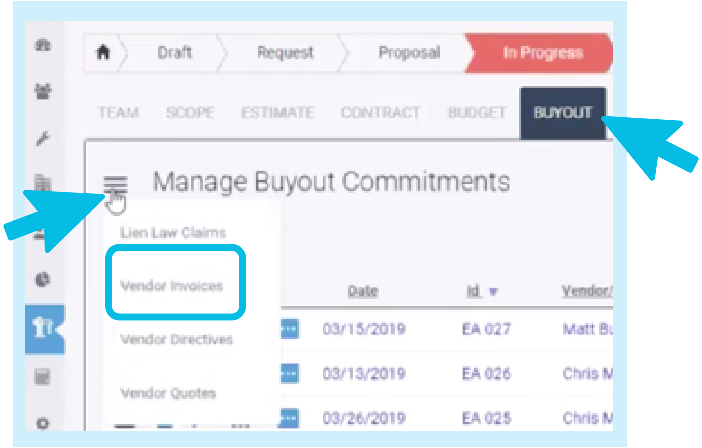
2 **Step Two: To sync a project from Redteam to Levelset,** go to the Scope tab of that project. Click **Edit**. Scroll down to the **Levelset Preferences** section. Check off the **Send project to Levelset** box and fill out all the fields in the Levelset Preferences section. Click **Save** (top of page) to send this job to Levelset.



Need help? Call Levelset's five-star Support team at 855-927-2737 or email mail@levelset.com.

3 **Step Three: To request waivers through Levelset,** go to the **Buyout** section of the project.

Click the house menu icon and select **Vendor Invoices** from the dropdown menu. Select the invoice that you would like to request a waiver on and click Edit on the invoice.



4 **Step Four: Request waiver.**

Go to Step 4 of the Vendor Disbursement (called "Lien Waivers"). You should see the claimant listed and the option under the Action column to Request a Waiver. (Look for the Levelset logo!) Click the **Request** button to fill out the waiver and send through Levelset.

(***Hint***: *If you don't see the Request Waiver option, you may need to add your Subcontractor as a Claimant. Contact RedTeam support to get this set up.)*

5 **Step Four: Track waiver request.**

You can track the status of your waiver request in your Levelset team account, under the **Requests** section of your account.

Last updated on October 23rd, 2020