

Oracle
**Textura Payment Management
Subcontractor Billing Workflow Guide**

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Title and Copyright Information

Oracle Textura Payment Management Subcontractor Billing Workflow Guide

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Primary Author: Oracle Corporation

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Billing Process for Subcontractors

Overview

When your General Contractor opens a draw period and invites you to submit your invoice, you will receive an email notification notifying you to enter your invoice details. In addition, a project task is also created inviting to enter billing details. Log into Textura here if you have elected not to receive email notifications. Selecting the **Enter Billing Details** project task from the **Project Home** page opens the Billing Workflow.

Use the Billing Workflow to:

- ▶ enter stored materials
- ▶ record billing details
- ▶ enter payments made to Sub-Tiers
- ▶ add additional information (hours worked and licenses/certifications)
- ▶ review your final invoice
- ▶ sign your invoice

FAQs

- ▶ ***I cannot bill or sign any documents*** (see page 29)
- ▶ ***I do not see any open draws to submit my invoice*** (see page 29)
- ▶ ***I missed the cutoff date to enter my invoice*** (see page 30)
- ▶ ***I submitted my invoice but need to adjust my final amounts*** (see page 30)
- ▶ ***What happens if the General Contractor rejects my invoice?*** (see page 30)

Additional Resources

- ▶ **In-App Help:** In the application, click the ? > **Help for this Page** in the top right corner of your page. The Help topics presented are context sensitive to the page you are on.
- ▶ **Documentation Library** (https://docs.oracle.com/cd/E97085_01/10313806.htm)
- ▶ **Support** (https://docs.oracle.com/cd/E97085_01/10313339.htm)

Working with your Billing Workflow for Subcontractors

1 Progress 2 Retention 3 Record Sub-Tiers 4 Review

Net This Period 0.00

Go To Draw Home Decline to Invoice Save & Continue

Enter Billing Details
Note: Retention held this period can be edited. Retention can be requested.

Search Item No. and Description of Work Quick Filter All Rows Table View Standard

Item No.	Description of Work	% Complete	Scheduled Value	Previously Billed	Work This Period	Material Stored This Period	Completed to Date	Balance	Retention % This Period	Retention Held This Period
	Tiling	4.65%	929,000.00	43,214.00	0.00	0.00	43,214.00	885,786.00	10.00%	0.00
	Carpentry	6.46%	1,356,340.00	87,642.00	0.00	0.00	87,642.00	1,268,698.00	10.00%	0.00
Total		5.73%	2,285,340.00	130,856.00	0.00	0.00	130,856.00	2,154,484.00	0.00%	0.00

Revert Save More

- 1) Your Billing Workflow tabs: Tabs help you navigate through the billing workflow. The tab you see depends upon project settings set by the General Contractor.

Tabs include:

- ▶ **Stored Materials:** Only available when projects use the **Track Stored Material Detail** project setting. Enter amounts to track materials used and stored on and off site during the draw.
- ▶ **Progress:** Only available when the draw allows progress billing. Track work completed during the draw period.
- ▶ **Retention:** Only available when the draw allows retention billing. Request previously held retention.
- ▶ **Record Sub-Tiers:** Conditionally available depending on documents chosen by the General Contractor. Record payments made to Sub-Tier Subcontractors during the draw period. You can also use this tab to add Manual and Lien Waiver Only Sub-Tier Subcontractors or Suppliers.
- ▶ **Additional Information:** Only available when a project tracks either drug testing or hours worked information. If a project includes both settings, you will see fields for both on this tab.
- ▶ **Review:** View a summary of the billing you entered for the draw. Information includes progress and retention billing. If your company participates in a Textura Payment Accelerator Program (TPA), you will also see associated fees and payments. This is the last step in the invoicing progress before you sign your draw documents. You must enter an invoice number before your company Signer can apply a signature to the invoice and associated documents.

- 2) Net This Period: A running balance of the net invoice for the draw appears in the page header.
- 3) Decline to Invoice button: Choose to not submit an invoice this draw period.
- 4) Save & Continue button: Save the current tab and progress to the next tab in your Billing Workflow. You can return to a previous tab at any time before signing your draw documents.
- 5) **Search and Filters:** Available on the **Stored Materials**, **Progress**, and **Retention** tabs. Easily find specific line items. You can also choose which line items you can see by changing the **Table View**.
- 6) Revert Button: Discard changes made to the invoice since the last time you saved the tab.
- 7) Add Change Orders button (Not Pictured): Add change orders to the contract directly from the **Enter Billing Details** page.

8) Save & Continue Button: Save your progress.

9) More Menu

- ▶ Contract Level Changes: Use the **Contract Level Changes** option to quickly edit billing amounts across the entire invoice. As long as retention or progress billing are not locked for the current draw, you can enter a percentage to change either the percent complete or retention held across all line items.

If this is the final invoice you plan to submit and you have completed all work on a project, you can select the **Bill Full and Final** check box. When you select this check box, the application will automatically request all previously held retention and update billing totals to reflect 100% completion. Not available on the **Stored Materials** tab.

- ▶ Export CSV: Export an Excel document of the current invoice.
- ▶ Upload Billing Amounts: Import a CSV file with invoice amounts. When you upload a file, the application will automatically enter your information into the invoice table. Download a template to ensure your document is formatted correctly for seamless integration. Not available on the **Stored Materials** tab.
- ▶ Clear Entire Invoice: Return all current billing amounts to 0.00. Not available on the **Stored Materials** tab.

10) Invoice Table: Available on the **Stored Materials**, **Progress**, and **Retention** tabs. A list of billable line items based off of the lines you originally edited in your **Schedule of Values**. View previous and current billed amounts and enter your billing for the current period.

You can also add invoice attachments to any line item in your invoice table from the **Attachments** column. All file types are acceptable. Recommended types include:

- ▶ PDF
- ▶ XLS
- ▶ CSV
- ▶ DOC
- ▶ PNG
- ▶ JPEG

11) Expand Symbol: When you contract a line to an on-system Sub-Tier, you can select the **Expand Symbol** to show Sub-Tier billing details. These details roll-up into your invoice details for the line item. Select the contract number to see Sub-Tier billing information in a dialog box.

Navigate to Your Billing Workflow for Subcontractors

- ▶ The action to **Enter Billing Details for Draw** appears under **Tasks**. You can find it on the **Tasks**, **Project Home**, and the **Draw Home** pages.

Notes:

- The **Enter Billing Details** task remains available until the invoice is signed.
- The name of this link changes depending on your workflow step. For example, you may see **Record Sub-Tiers** if you already entered progress or retention billing amounts.
- If you are accessing your Billing Workflow as a part of the signing process, you will see a **Sign Invoice** link on the **Tasks**, **Project Home**, and **Draw Home** pages.

Filtering and Using Search for Subcontractors

You can search and filter the table in your Billing Workflow to easily navigate through line items.

Search Bar

Enter an item number or description to find a specific line item in the invoice.

Quick Filter drop-down

Use the drop-down to easily change the table view. Options include:

- ▶ **All Rows:** See every line item available in the invoice table.
- ▶ **Items Previously Billed:** Progress and Retention tabs only. View only line items which include amounts billed in previous periods.
- ▶ **Items Billed This Period:** Progress and Retention tabs only. View only line items which include billing for the current draw period.
- ▶ **Items with a Balance:** View only line items which still have an outstanding balance greater than 0.00.

Using Table Views for Subcontractors

Available only on the **Progress** tab. Use the drop-down to change columns available in the invoice table. Options include:

- ▶ **Standard:** The default view. The table includes columns for billing this period and billing to date.
- ▶ **Percent:** The table only includes a **% Complete** column for billing. You will still see columns for your scheduled value and retention amounts.
- ▶ **Unit:** Available when projects track unit billing. Bill for items based on quantity used.

Submitting your Invoice

Before You Begin

- ▶ Approve Sub-Tier invoices before entering your own invoice. If you save and submit the invoice to the Signer before approving them, the Sub-Tiers will be excluded from the draw.

- ▶ **Note:** Advanced Billing allows you to bill for a Sub-Tier's costs before you receive the Sub-Tier's invoice.
- ▶ See **Working with your Billing Workflow for Subcontractors** for a high-level overview of the tabs and options you may see.
- ▶ For a visual guide on your Billing Workflow, see our video: **Watch how to submit an invoice as a Subcontractor** (see Watch how to submit an invoice as a Subcontractor - https://players.brightcove.net/2985902027001/default_default/index.html?videoId=6136585616001).

Submitting Your Invoice

The Billing Workflow guides you through the steps required to submit your invoice to a General Contractor. Available tabs and options are based on project and document settings chosen by the General Contractor. You can move back and forth between workflow tabs until you proceed to the signing process.

To submit an invoice to your General Contractor:

- 1) **Navigate to Your Billing Workflow for Subcontractors** (see page 5).
The first tab you see depends upon project and draw settings. Most users will see the **Progress** tab, unless the project tracks stored material usage.
- 2) Follow the steps listed in the topics under this section to complete your invoice submission.
Note: The tabs you see on your billing workflow are set by project and draw settings. Skip the topics for the tabs that are not present in your workflow.

Recording Stored Materials on the Stored Materials Tab for Subcontractors

To enter stored materials as a part of your Billing Workflow for Subcontractors:

- 1) **Navigate to Your Billing Workflow for Subcontractors** (see page 5). Skip this step if you are already on your billing workflow.
- 2) Ensure that you are on the **Stored Materials** tab. When projects have stored material recording enabled, this is the first tab you will see when you begin the billing process in your Billing Workflow.
- 3) Choose a line to bill against. The selected field will have a darker border than the other cells in the table.

Notes:

- **Cannot edit one of these fields?** Some General Contractors use component types to specify how labor or stored materials can be billed. When used, Subcontractor billing is limited by the component type.
 - If a line includes a Sub-Tier subcontract, the Self-Performed and Contracted lines display beneath the Total line. You can enter amounts on the Total line or the Self-Performed line.
- 4) For materials used on site, review and enter an amount for the following fields:
 - ▶ **Previous Stored Materials:** Review this field to see the total amount of materials received on site before the current draw.

- ▶ **Consumed This Period:** Use this field to record materials that are used during the current draw. The materials may have been received in a prior period or in the current period. This field is not used to calculate payment.
 - ▶ **Received This Period:** Use this field to record materials that are received and stored on site during the current draw. This field is used to calculate the payment.
 - ▶ **Materials Stored to Date:** Review this field. This field includes the **Previous Stored Materials** amount plus the **Received This Period** amount less the **Consumed This Period** amount.
- 5) For materials used off site, review and enter an amount for the following fields:
- ▶ **Previous Stored Materials:** Review this field to see the total amount of materials received off site before the current draw.
 - ▶ **Consumed This Period:** Use this field to record materials that are used during the current draw.
 - ▶ **Received This Period:** Use this field to record materials that are received and stored off site during the current draw.
 - ▶ **Materials Stored to Date:** Review this field. This field includes the **Previous Stored Materials** amount plus the **Received This Period** amount less the **Consumed This Period** amount.
- 6) Select the **Save & Continue** button to progress to the next tab in your Billing Workflow.
- ▶ Amounts added to the **Stored Material** tab are shown in the **Material** columns on the **Progress** tab.
 - ▶ You can return to the **Stored Materials** tab at any time while working through the billing process.

Tip

Material Stored to Date is the sum of the **Off Site Stored to Date** amount and the **On Site Stored to Date** amount.

Recording Progress Billing for Subcontractors

To enter progress billing details as a Subcontractor on the **Progress** tab of the your Billing Workflow:

- 1) **Navigate to Your Billing Workflow for Subcontractors** (see page 5). Skip this step if you are already on your billing workflow.
- 2) Ensure that you are on the **Progress** tab.
 - ▶ The **Progress** tab will display first for most users beginning the invoicing process.
 - ▶ If a project allows stored material tracking, this will be the second tab in the invoicing process.
 - ▶ If the current draw does not allow progress billing, you will not see this tab.
- 3) Enter billing amounts:
 - a. Choose a line to bill against. The selected field will have a darker border than the other cells in the table.

Unable to edit a field? Some General Contractors use component types to specify how labor or stored materials can be billed. Subcontractor billing is then limited by the component type.

- b. Enter an amount under the **Work This Period** column.

Once an amount billed is entered:

- Amounts in the **% Complete, Completed to Date, and Net This Period** are automatically calculated
- The **Retention Held This Period** amount is automatically calculated. The retention calculation is based on the project's default percentage.

- 4) Optional. Add comments to a line for later review or as a message to an on-system user. The line item comments entered here are visible to your General Contractor when they view or modify your invoice.
 - a. In the **Description of Work** column, select the speech button icon. A **Comments and History** dialog box displays.
 - b. In the available field in the dialog box, enter your comment.
 - c. Select **Ok**.
The dialog box closes and the speech bubble icon turns blue. Select the blue icon to view available comments.
- 5) Optional. Use the **Contract Level Changes** option to quickly calculate billing for the final invoice on a project.
 - a. From the **More** menu select the **Contract Level Changes** option. A dialog box displays.
 - b. In the dialog box, select the **Bill Full and Final** check box.
The application:
 - Automatically calculates all line items at 100% work completed
 - Reduces retention to 0%
 - Requests all previously held retention.

Note: For the **Bill Full and Final** option to calculate work completed and retention requests, the current draw must allow progress and retention billing. If the draw does not allow both, the check box will not be active.

- 6) Check the invoice totals at the bottom of the page.
- 7) Select the **Save & Continue** button to progress to the next tab in your Billing Workflow.

There are two additional ways to update billing totals on the **Progress** tab:

- 1) Bill for a completed percentage
- 2) Bill for stored materials.

Bill % Complete

To bill based on percentage, update the amount in the **% Complete** field. The **Work This Period** field shows the dollar amount. All other fields are automatically calculated.

Tip

Invoice amounts may not exceed the remaining balance for any line item.

Bill for Material Stored This Period

Enter the dollar amount of material stored between the draw **Period From** and **Period To** dates in the **Material Stored This Period** field.

Notes:

- Entering an amount in this field automatically adjusts **Completed to Date** field.
 - **Need to bill for previously held retention?** A General Contractor must allow retention billing for a draw. The page includes a message indicating whether you can bill for retention. You will request retention on the **Retention** tab of your Billing Workflow.
 - The invoice is not submitted for payment until it is signed. Final invoices must be signed by the Subcontractor to be included in a draw.
 - Invoices can be saved at any time or edited until the invoice has been signed. You can also move between any of the available invoicing tabs before signing the invoice.
 - The **Progress** tab page automatically includes values for % **Complete**, **Scheduled Value**, and **Previously Billed** amounts. The total in these columns carry over from previous invoices.
-

Adding an Attachment as a Part of Your Billing Workflow

You can attach documents to specific line items when entering your billing information.

To add an attachment from **Your Billing Workflow**:

- 1) Select the **Progress** tab.
- 2) From the **Attachments** column for the line item you want to add an attachment to, select the paperclip icon.

An **Attachments** panel opens on the side of the page.

- 3) From the **Attachments** panel, select the **+Upload Document** button.

Additional fields display in the panel.

- 4) Enter a description for the document.
- 5) Optional. Choose to classify the document.

When you classify documents, only users in your organization with the **Manage Classified Documents** user permission can view the document.

- 6) Select the **Save** button.
 - ▶ A **Success** message displays, confirming you successfully added an attachment.
 - ▶ The panel shows whether you chose to classify the document and the document itself is marked as **Classified**.

- ▶ The document name and description displays in the panel. The panel lists all documents attached to the line item.
 - ▶ The **Attachments** column now displays the number of documents attached to the line item.
- 7) Optional. Add additional attachments by following steps 3-6.
 - 8) Select the **X** to close the panel.

Billing Line Item Retention for Subcontractors

There are two ways to bill for line item retention during a draw.

Line-by-Line Billing

To enter retention on a line-by-line basis:

- 1) **Navigate to Your Billing Workflow for Subcontractors** (see page 5). Skip this step if you are already on your billing workflow.
- 2) If you do not automatically see the **Retention** tab, select it from the blue bar at the top of the page.
- 3) From the **Retention** tab, select a line to bill against.

The selected field will have a darker border than the other cells in the table.

Note: Retention is entered on a line-by-line basis unless you request overall retention or a project uses Contract Level Retention.

- 4) Enter an amount to bill in the **Request Previously Held** column. This amount cannot exceed the **Retention To Date** value.
- 5) Review the totals at the bottom of the page, including retention, and make any adjustments needed.
- 6) (Optional) Enter your comments. Line item comments entered here are visible to your General Contractor when they view or modify your invoice.
- 7) Select the **Save & Continue** button to progress to the next tab in the billing process.

Bill for Overall Retention

To bill for retention across all line items:

- 1) **Navigate to Your Billing Workflow for Subcontractors** (see page 5).
Depending on settings selected by the General Contractor, you might see the **Stored Materials** or **Progress** tab upon navigating to the page.
- 2) If you do not automatically see the **Retention** tab, select it from the blue bar at the top of the page.
- 3) From the **More** menu on the **Retention** tab, select **Contract Level Changes**.
- 4) In the **Change Retention Held %** field, enter a new retention percentage.
- 5) Select **Save**.

The application calculates the difference between the original retention rate and the new percentage you entered. It will then automatically request the correct retention amount in the **Request Previously Held** field for all line items which had previously held retention.

- 6) Select the **Save & Continue** button to progress to the next tab in the billing process.

Recording Payments to Sub-Tiers

To record your payment information to Sub-Tier Subcontractors:

- 1) **Navigate to Your Billing Workflow for Subcontractors** (see page 5). Skip this step if you are already on your billing workflow.
- 2) From your Billing Workflow, select the **Record Sub-Tiers** tab.

Note: If the draw does not include payments to Sub-Tier Subcontractors or Suppliers, select **Proceed** to confirm that you are not adding suppliers to a project before selecting the **Save & Continue** button to move on to the next step in the workflow.

- 3) Optional. Add Sub-Tier Subcontractors and Suppliers. Include all Suppliers and organizations you are going to pay through the project.
 - a. Select **Add New Sub Tier**.
A dialog box opens.
 - b. In the dialog box, enter the name of the Sub-Tier in the **Organization Name** field.

Notes:

- If your Suppliers are required to sign lien waivers on the system, use the auto-complete feature.
 - When you start entering an organization's name, auto-complete shows a drop-down list of matching organizations on the system.
-

- c. Enter **Location** information.

Required Fields:

- Country
- City
- State
- Postal Code
- Phone Number
- Tax ID

Optional

- Address
- Contact Name

- d. Select **Save**.

Organization information displays in a table on the **Record Sub-Tiers** tab. If location is editable, you can select the pencil icon in the table to make changes.

- 4) Select an organization.

- 5) In the **Service** field, enter a description for the services the Sub-Tier provided.
- 6) In the **Contract Amount** field, enter the total expected value of the Sub-Tier's contracted services.
- 7) In the **Current Payment** field, enter a payment amount.
- 8) If you are entering payment for a Lien Waiver Only Sub-Tier (LW Sub), this payment amount will display on their lien waiver when they are prompted to sign it.
- 9) Confirm that the amounts are correct, and select the **Save & Continue** button to progress to the next step of your Billing Workflow.

Note: The invoice is not submitted for payment until it is signed. Final invoices must be signed by the Subcontractor in order to be included in a draw.

Informational Fields

Users cannot edit the following informational fields:

- ▶ **Org Status:** Shows the relationship between the Sub-Tier and the Prime Subcontractor
 - ▶ **Manual:** An off-system organization that provides materials or additional labor for an on-system Subcontractor
 - ▶ **LW Sub (Lien Waiver Only Sub-Tier):** An off-system organization that provides materials or additional labor for an on-system Subcontractor, is paid off-system, but provides lien waivers through the system
 - ▶ **On-Sys:** A Sub-Tier Subcontractor or Supplier that provides materials or additional labor for an on-system Subcontractor, provides lien waivers through the system and is paid through the system

Note: On-System Sub-Tiers will display on the **Record Sub-Tiers** tab, but the fields are not editable.

Did you forget to invite an On-System Sub-Tier?

If an expected payment is not included on the **Record Sub-Tiers** tab, add a draw participant. If you proceed to the signing step before approving a Sub-Tier's invoice, the Sub-Tier will be excluded from the draw.

See Manage Draw Participants for Subcontractors and Review Tab for Subcontractors for more information about these workflow steps.

- ▶ **Location:** Displays the location entered in an on-system contract. This field is editable for Manual Sub-Tiers.
- ▶ **Previously Paid:** Shows the dollar amount of the work billed for this line item, before the draw
- ▶ **Balance Due:** Shows the amount left to bill on the contract (the total amount of work outstanding on the contract)

Recording Hours Worked for Subcontractors

To enter the hours you worked:

- 1) **Navigate to Your Billing Workflow for Subcontractors** (see page 5). Skip this step if you are already on your billing workflow.
- 2) Select the **Additional Information** tab.
- 3) Under the **Total Hours Worked** section, enter the number of hours worked during the draw period into the **Total Hours Worked This Draw** field.
- 4) Select **Save & Continue**.

Hours worked are saved, the tab closes, and the **Review** tab opens.

Missing this tab? This tab is triggered by a project setting selected by the General Contractor. Hours only need to be reported if the project setting is used.

Tip

If you are a Prime Subcontractor, you must include hours worked by you and your Sub-Tier Subcontractors in the **Total Hours Worked** field.

Hours reported by your on-system Sub-Tier Subcontractors display on the page. The **Hours reported by on-system Subcontractors** field is populated when a Sub-Tier Subcontractor's invoice is approved.

Note: Hours reported on unapproved invoices will not be included in this field.

Recording Drug Testing Information for Subcontractors

To record drug test certifications:

- 1) **Navigate to Your Billing Workflow for Subcontractors** (see page 5). Skip this step if you are already on your billing workflow.
- 2) Use the up and down arrows to choose the number of drug tests taken and the total amount of positive drug testing results for each line. Leave the field blank if information is not available or not applicable.
- 3) Enter the laboratory information in the **Name of Collection Site/Laboratory Used** field.
- 4) Select **Save & Continue** to progress to the next step of your Billing Workflow.

Missing this tab? Drug testing fields are triggered by a document selected by the General Contractor. Test results are only

required for projects that use the document. You will not see the **Additional Information** tab unless a project requires either hours worked or drug testing tracking.

Reviewing your Billing and Proceeding to Signing

To review and continue to signing your draw documents:

- 1) **Navigate to Your Billing Workflow for Subcontractors** (see page 5). Skip this step if you are already on your billing workflow.
- 2) Select the **Review** tab.
- 3) From the **Billing Summary** card, review your billing summary.
- 4) Optional. If your organization has enrolled in TPA, click the **How it's calculated** link to understand how early payment fee is calculated. See topic Viewing the Early Payment Fee Calculation for more information.

If you are an Enterprise or Local Administrator and your invoice is eligible for TPA but not currently enrolled, the page will prompt you to accelerate payment before generating documents to sign. See Accelerating an Invoice at the Review and Sign Invoice Submission Step.

- 5) Enter an invoice number. This is a required field, and you cannot proceed to signing without it.
- 6) Optional. Select **No, take me to billing values** to continue modifying your invoice amounts on previous tabs in your Billing Workflow.

Unable to send your invoice to the Signer?

If Oracle failed to collect your usage fee for this contract, your organization will be blocked from signing billing documents. For more information on usage fee failures and how to fix them, see Usage Fee Failures.

- 7) Select the **Yes, proceed to signing button**.

The application will generate your documents. This process usually takes less than five seconds but can take longer if you have a long schedule of values. The page will automatically update when the documents have generated.

When the documents have generated:

- ▶ If you are the Signer, a **Sign Billing Documents** card displays. You will use this and additional cards to access DocuSign to sign all draw documents, including lien waivers and, when applicable, sworn statements.
- ▶ If you are not the Signer, the application will email the Signer a task to sign the documents. You can see the status from this page.

Signing Documents for Subcontractors

To sign a document on the **Review** tab of your Billing Workflow:

- 1) **Navigate to Your Billing Workflow for Subcontractors** (see page 5) Skip this step if you are already on your billing workflow.
- 2) From the **Review** tab, select the **Sign Billing Documents** button.
 - ▶ If your documents require optional fields, an **Enter Optional Fields** dialog box displays. Optional fields may include item codes for sworn statements or conditional lien waiver exceptions.
 - a. (Optional) In the **Enter Optional Fields** dialog box, complete the fields required for your documents.
 - b. Select the **Save** button.
 - ▶ If a document requires notarization, you will see Notary login information. Your notary will need to log in before you can proceed with signing.

See **Electronic Notarization on TPM for Subcontractors** for more information about the electronic notary process on TPM.

All documents requiring a signature open up in a DocuSign portal. Instructions appear at the top of the page.
- 3) From the top of the DocuSign page, select the **Continue** button.
- 4) (Optional) Select **Start** to help guide you through the signing process. Each time you apply your signature, a blue tab helps direct you towards the next step.
- 5) Select the highlighted area in the document to apply your signature.
- 6) Continue through all of your documents, applying your signature to all highlighted fields.
- 7) After you apply your signature to all of the highlighted areas, select the **Finish** button at the top of the page.

Note: If your documents require notarization, the **Review** tab will display again. An electronic notary must complete the notary steps before you can submit your signed documents.

See **Electronic Notarization on TPM for Subcontractors** (on page 17) for the steps the Notary must follow.

- ▶ A success message displays, confirming you finished signing your documents.
 - ▶ A green check mark displays along with a message with the date and time when you signed the billing documents displays on the **Sign Billing Documents** card.
 - ▶ A **Sign Lien Waiver** card appears on the **Review** tab.
- 8) From the **Sign Lien Waiver** card, select the **Sign Lien Waiver** button.

The lien waiver document opens in a DocuSign portal.
 - 9) Follow steps three through seven to sign the lien waiver.

Unsure about signing a lien waiver on the system? When you sign an unconditional lien waiver, it is placed in a secure electronic location. The signed version cannot be viewed or accessed until three days after payment has been disbursed. The General Contractor can only view an unsigned version of your unconditional lien waiver prior to payment.

Contact **Oracle Support**

https://docs.oracle.com/cd/E97085_01/10313339.htm with questions

regarding the lien waiver policy.

When you finish, a **Next Steps** dialog box displays, confirming you finished signing your document and sent your payment application forward for approval. You can navigate to additional outstanding tasks from this dialog box.

Lien Waiver Policy

To use the system, Subcontractors must sign an unconditional lien waiver when submitting an invoice to the General Contractor.

System lien waiver policy states:

- ▶ Current period lien waivers must be signed to receive payment via ACH
- ▶ General Contractors cannot see signatures on lien waiver documents until three business days after disbursement.

For more information on the lien waiver policy, refer to section 1.2 of the **Textura Payment Management and Textura Early Payment Cloud Service - Service Descriptions and Metrics (PDF)** (see Textura Payment Management and Textura Early Payment Cloud Service - Service Descriptions and Metrics (PDF) -

<https://www.oracle.com/corporate/contracts/cloud-services/service-descriptions.html#tech-cloud>) contract.

Electronic Notarization on TPM for Subcontractors

Oracle Textura Payment Management (TPM) supports electronic notarization for invoices, lien waivers, and sworn statements. Notaries witness the signing of documents and verify the identity of the person signing a document.

When a document on TPM requires notarization, your Billing Workflow displays notary fields before you can apply your signature. Electronic notarization requires the Notary to use the Signer's computer to verify the Signer's signature. When prompted, Notaries enter their username and password, watch the Signer sign the document, and then add their own signature to the electronic document. Notaries in some states will also apply a notary seal when signing.

The system will apply the signature and other state specific requirements to the document.

Set up notary permissions on the Notary's user profile.

Keep in mind:

- ▶ TPM does not currently support notarization in: North Carolina, Puerto Rico, Territory of American Samoa, Federated States of Micronesia, The United States of Territory of Guam, Republic of Marshall Islands, Commonwealth of the Northern Mariana Islands, Commonwealth of Puerto Rico, Republic of Palau.
- ▶ To notarize documents, a user must have the **Notarize Documents** permission. The user profile must also include all required notary information.

- ▶ Any Notary on the system can notarize a document.
- ▶ A user cannot act as both Signer and Notary for a document because you cannot notarize your own signature. You need a Notary user to witness the Signer's signature.
- ▶ A Notary's signature must be applied shortly after a Signer signs the document.
- ▶ Colorado notaries are required to enter their Document Authentication Numbers (DANs).
- ▶ Florida notaries authenticate in order for the system to prepare the correct language to appear on the document for signing and notarization.

Watch the Creating a Notary Profile Video (see Creating a Notary Profile - https://players.brightcove.net/2985902027001/default_default/index.html?videoId=6309888259112)

Notarizing a Document

As a notary public with an account on TPM, you will witness the Signer applying their signature to a document and then you will electronically notarize that signature from the same computer.

Note: Your notary signing process may differ slightly between projects. Project settings, invoice documents, conditional and unconditional lien waivers, and sworn statements chosen for the project affect how both documents are signed and how you will notarize those signatures.

Complete the following steps to notarize a document from **Your Billing Workflow**:

- 1) Select the **Review & Sign** tab.
- 2) From the **Sign Billing Documents** or **Sign Lien Waivers** card, enter your username and password for your notary account.
- 3) Select the **Login Notary** button.
If your Notary login has been verified, the **Notarize** button is activated.
- 4) The Signer signs the documents by selecting the **Sign Billing Documents** or **Sign Lien Waiver** button.
- 5) Select the **Notarize Documents** button.

Notaries commissioned by the state of Colorado need to include DAN information when notarizing projects. See ***Notarizing Documents with a Document Authentication Number*** for more details.

All documents requiring notarization open up in a DocuSign portal. Instructions appear at the top of the page.

- 6) From the top of the DocuSign page, select the **Continue** button.
- 7) Optional. Select **Start** to help guide you through the signing process. Each time you apply your signature, a blue tab helps direct you towards the next step.
- 8) Select the highlighted area in the document to apply your signature.
If your state requires a Notary Seal, select the highlighted area in the document to apply your seal.

Note: Your notary seal will only display if you included it on your user profile and the document supports notary seals.

- 9) Continue through all of your documents, applying your signature to all highlighted fields.
- 10) After you apply your signature to all of the highlighted areas, select the **Finish** button at the top of the page.

When the signing user submits the invoice, the draw moves to the **Pending Payment** section on their **Project Home** page.

Notarizing Documents with a Document Authentication Number

A Notary Public in the state of Colorado must enter a unique Document Authentication Number (DAN) when notarizing a document on the system. The DAN acts as the legal equivalent of a notary seal used in paper notarization.

When the Notary is commissioned by the state of Colorado, the application initiates notarization with the DAN functionality.

Note: To include a DAN, the General Contractor must select a document that supports the DAN functionality.

- 1) The Signer selects the **Sign Document** link from the **Project Home**, **Draw Home**, or **Tasks** page.
The **Sign Document** page displays. It includes a **Confirm Notary** dialog box.
- 2) In the dialog box, enter your username and password, and then select **Authenticate**.
An **Enter Document Authentication Numbers** dialog box displays.
- 3) In the dialog box, enter the last four numbers of your DAN and select **Submit**.

Notes:

- Selecting **Cancel** instead of **Submit** causes the system to return to the **Project Home** Page.
 - If multiple documents require notarization, you may need to enter multiple DANs. DANs are unique to each document.
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- 4) The Signer selects the **Sign Invoice** button on the **Sign Document** page and signs the document in DocuSign.
The system returns to the **Sign Document** page and includes Notary fields.
- 5) Select the **Notarize** button.
A PDF version of the document displays.
- 6) Select the highlighted area in your document.
The Notary signature and DAN displays on the document.
- 7) From the top of the PDF, select **Finish** to submit the document.
After the document is notarized and the application has been sent, the draw moves to the **Pending Payment** section on your **Project Home** page.

Bypassing Electronic Notarization When Signing a Document

If a General Contractor enables the electronic notarization bypass workflow, you can skip the electronic notarization step when signing a document which needs notarization on TPM. Instead, you will scan and upload an image of your document signed and notarized in the traditional pen and paper way after you complete your signing process.

To bypass electronic notarization while signing a document:

- 1) **Navigate to Your Billing Workflow for Subcontractors** (see page 5).
- 2) From the **Review** tab, select the **Sign Billing Documents** button.
If the document requires notarization, you will see a section for your electronic notary to add their sign in credentials. When a project allows the electronic notarization bypass workflow, an **Offline Notarization** section with instructions explaining the process displays on the page.
- 3) Select the **I would like to Bypass Electronic Notarization** link.
A **Bypass Electronic Notarization** dialog box displays. It warns of a potential payment hold for notarizing signatures offline. The payment hold acts as a safeguard to ensure your General Contractor reviews the document you will later upload to the **Track Offline Notary** page.
- 4) From the **Bypass Electronic Notarization** dialog box, select **Ok**.
- 5) Select **Sign Billing Documents** to continue your signing process.
See **Signing Documents for Subcontractors** for how to electronically sign documents on TPM.
- 6) Continue with the **Track Offline Notary** workflow.
See Uploading a Notarized Document from the Upload Notarized Document Task for how to upload a notarized document to Textura.

View a video guide on how to bypass electronic notarization

https://players.brightcove.net/2985902027001/default_default/index.html?videoId=6279084241001.

Additional Information

Progress and Retention Tab Fields Overview

Editable Fields on the Progress Tab

Unable to edit one of these fields? Some General Contractors use component types to specify how labor or stored materials can be billed. When component types are used, Subcontractor billing is limited by the component type.

% Complete

Bill a percentage of work completed in the current and all previous draws. Entering an amount will automatically adjust the **Work This Period** field.

Work This Period

Bill for the dollar amount of the work completed between the draw **Period From** and **Period To** dates. Entering an amount in this field will automatically adjust the **% Completed** field.

Material Stored This Period

Bill the for the dollar amount of material stored between the **Period From** and **Period To** dates. Entering an amount in this field will automatically adjust the **Completed to Date** and **% Complete** fields.

Completed to Date

Bill for the total dollar amount of material stored for the current and previous draws. Entering an amount in this field will automatically adjust the **Work This Period** field.

Attachments

Select the icon to add an attachment to the invoiced line. This column includes a count of how many attachments are currently uploaded for the line item.

Editable Fields on the Retention Tab

Retention % This Period

The percentage of your billing held as retention for the current draw. If the General Contractor did not lock retention, you can edit the retention percentage.

Retention Request Previously Held

Bill for a dollar amount of retention held in previous draws. This field is only editable if the General Contractor did not lock retention on the current draw.

Informational Fields

Expand Arrow

Allows you to show or hide line item details. Use the expand symbol in the first table column to see the Self-Performed and Subcontract lines. If you select a subcontract number from the expanded line, you can drill down into more billing details in a dialog box.

Description of Work

A name given to the line item. This description carries over from your Schedule of Values.

Scheduled Value

Current total value for the line item.

Completed to Date

Dollar amount of the work billed for this line item, before the draw.

Retention to Date

Amount of retention held in retention before the current draw.

Retention % to Date

The rate in which retention was held before the current draw.

Net This Period

The amount billed during this draw, less retention held.

Specified Billing and Advance Billing

Specified Billing

A General Contractor can use the **Specified Billing** setting to enter an invoice on behalf of a Subcontractor. As a Subcontractor, you approve and sign the invoice from your Billing Workflow. If the project includes **Specified Billing**, you cannot enter or modify invoice details.

Advanced Billing

If a subcontract includes **Advance Billing**, you may bill for Sub-Tier costs in your Billing Workflow. You can invoice for a Sub-Tier even if the Sub-Tier does not invoice or submits a late invoice.

- ▶ An amount billed on a component total line can be greater than the self-performed line.
- ▶ Total amount billed cannot exceed a component's scheduled value.

Note: The **Balance to Finish** will be negative on the self-performed line.

- ▶ Sub-Tier amounts remain zero until the Sub-Tier submits an invoice or the Subcontractor enters an amount greater than the self-performed total.
- ▶ Approved Sub-Tier amounts appear on the **Progress** tab of your Billing Workflow for reference.

Not sure whether your project uses Advanced Billing?

See ***Advance Billing Overview for Prime Subcontractors*** (on page 22) for more information on the project setting.

Advance Billing Overview for Prime Subcontractors

As a Prime Subcontractor, you can use the **Advance Billing** project setting to bill for more than 100% on a subcontract component. You can also use it to bill a negative percent complete on self-performed work.

If you select the **Advance Billing** setting on the **Project Settings** page, your Billing Workflow includes subcontracted line items.

Why Use Advance Billing?

- ▶ To receive more money at the beginning of the project
- ▶ To easily invoice for a Sub-Tier Subcontractor or Supplier, even if the Sub-Tier has not yet invoiced or submitted a late invoice

Your Billing Workflow

Advance Billing changes the behavior of the Progress tab of your Billing Workflow. Subcontractors have the ability to bill a component to the General Contractor for an amount greater than the Self-Performed amount. This ability does not depend on the amount a Sub-Tier billed or whether an invoice was received for that component.

Configuring Unit Billing for Subcontractors

If your project uses **Unit Price Billing**, you may enter an invoice in units and quantities instead of dollar amounts. Some specialized invoice formats require **Unit Price Billing**.

From the **Table View** drop-down list, select the **Unit** option to view additional fields in the invoice table:

- ▶ Unit Price
- ▶ Unit Name
- ▶ Scheduled Qty (Quantity)
- ▶ Previous Qty (Quantity)
- ▶ Qty (Quantity) This Period
- ▶ Material Qty (Quantity) This Period
- ▶ Qty (Quantity) Completed to Date

1) **Navigate to Your Billing Workflow for Subcontractors** (see page 5).

- ▶ The **Progress** tab will display first for most users beginning the invoicing process.
- ▶ If a project allows stored material tracking, this will be the second tab in the invoicing process.
- ▶ If the current draw does not allow progress billing, you will not see this tab.

2) Enter billing amounts:

- a. Choose a line to bill against. The selected field will have a darker border than the other cells in the table.
- b. In the **Work Completed This Period Qty** column, enter a quantity.
 - Amounts in the **% Complete**, **Work Period**, and **Qty Completed To Date** columns automatically update once the amount billed is entered.
 - **Retention This Period** automatically calculates based on the contract's default percentage, which is selected by the General Contractor.

3) Select the **Save & Continue** button to progress to the next tab in your billing workflow.

Note: The invoice is not submitted for payment until it is signed. Final invoices must be signed by the Subcontractor in order to be included in a draw.

Declining to Invoice for Subcontractors

Decline to invoice if no work was completed in the draw period.

1) **Navigate to Your Billing Workflow for Subcontractors** (see page 5).

Depending on project and draw settings, you will see the **Stored Materials**, **Progress**, or **Retention** tab.

- 2) From your Billing Workflow, select the **Decline to Invoice** button.
A dialog box displays.
- 3) In the dialog box, enter a reason for declining to invoice.
- 4) Select the **Decline** button.
 - ▶ The application navigates to the **Project Home** page and a message confirms you successfully declined to invoice for the draw.
 - ▶ The General Contractor, the Subcontractor, and any Sub-Tiers receive an email that shows the Subcontractor declined to invoice. It includes the reason entered in the **Decline to Invoice** dialog box.

Caution: There is no undoing this step. If you choose to decline to invoice, all changes are lost and you are immediately removed from the draw.

Importing an Invoice from a File for Subcontractors

To import an invoice as a part of your Billing Workflow:

- 1) **Navigate to Your Billing Workflow for Subcontractors** (see page 5).
 - ▶ The **Progress** tab will display first for most users beginning the invoicing process.
 - ▶ If a project allows stored material tracking, this will be the second tab in the invoicing process.
 - ▶ If the current draw does not allow progress billing, you will not see this tab.
- 2) From the **More** menu on the **Progress** tab, select **Upload Billing Amounts**.
An **Upload Billing Amounts** dialog box opens.
- 3) In the dialog box, choose to upload either:
 - ▶ **This Period Billing Amounts:** The amount you want to bill for this period.
 - ▶ **To Date Billing Amounts:** Amounts billed until the current billing period.
- 4) Select the **Download Template** button to get a pre-formatted Excel spreadsheet for uploading. The template includes phase codes, description, budget amounts, and the current billing amounts for the line items in your contract.
- 5) Update the file with desired billing and retention values.

Caution: If your retention amounts do not meet the retention settings, the system will override the amounts in the file.

- 6) Save the CSV file.
- 7) Fill out the CSV file and save it.
- 8) From the dialog box, select the ellipses (...) to find and select your file.
The selected file name will display in the dialog box.
- 9) Select the **Upload** button.
The dialog box closes and the values from the uploaded CSV appear in the table.

- 10) Review the imported entries in your Billing Workflow.
- 11) Select **Save & Continue** to progress to the next tab in your billing process.

Deleting an Invoice Attachment as a Part of Your Billing Workflow

To add delete an attachment as a part of **Your Billing Workflow**:

- 1) Select the **Progress** tab.
- 2) From the **Attachments** column for the line item which includes the attachment you wish to delete, select the **paper clip icon**.
An **Attachments** panel opens on the side of the page.
- 3) From the panel, select the **trash can icon** next to the name of the document you want to delete.
The application prompts you to confirm your decision.
- 4) Select the **Yes** button.
 - ▶ A **Success** message displays, confirming you successfully deleted the document.
 - ▶ The name of the document disappears from the **Attachments** panel.
 - ▶ The number displayed in the **Attachments** column decreases in value, reflecting the new number of documents attached to the line item.

DocuSign Overview

Documents signed within the Textura Payment Management (TPM) application are signed using DocuSign's secure cloud platform. As the market-leader in digital signature capabilities, DocuSign meets the industry's rigorous security certification standards and operations. DocuSign's comprehensive approach ensures the security, privacy, compliance, and enforceability of your DocuSign transactions.

TPM will notify the Signer when the billing documents are ready for a signature. With DocuSign integration, the signing process does not require the Signer to enter a PIN to at the time of signing due to robust single-sign-on between TPM and the DocuSign platform. DocuSign provides on-screen instructions and visual guides for each step ensuring an intuitive end-user experience. During the signing process, the Signer signs all documents consecutively. Once the Signer applies a signature to all necessary places, the **Finish** button returns the Signer to TPM.

Each page of a document signed on TPM will now contain a stamp indicating the secure DocuSign Envelope ID that contains that document. The Envelope ID is the permanent reference to the DocuSign signing transaction for that document, and you can use it to access the DocuSign Certificate of Completion.

- ▶ **Enforceability and Non-Repudiation of Transactions**
- ▶ **Certificates of Completion.**

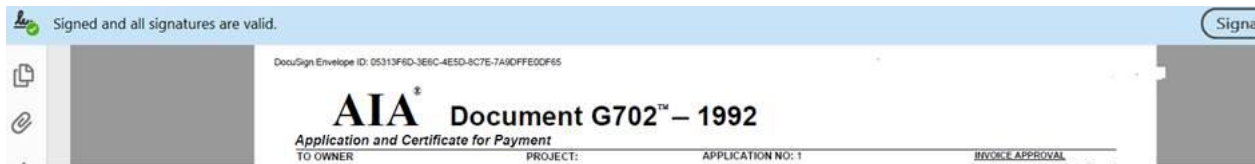
Download this DocuSign Overview as a PDF file.

https://docs.oracle.com/cd/E97083_01/en/docusign/tpm_docusign_guide_na.pdf

Enforceability and Non-Repudiation of Transactions

DocuSign takes the security, integrity, and enforceability of the documents signed on their platform very seriously. As noted in their documentation at <https://www.docusign.com/how-it-works/security> (see <https://www.docusign.com/how-it-works/security> - <https://www.docusign.com/how-it-works/security>), DocuSign employs best-in-class security and privacy standards for and industry-leading technology to ensure the integrity of signatures for documents signed using their platform. As a result, DocuSign is willing to attest to the validity of documents signed with their technology, allowing DocuSign to warrant compliance with the ESIGN Act.

All documents signed on the DocuSign platform utilize a hashing algorithm you can use to verify that the documents have not been modified, and DocuSign's PKI digital certificate technology secures documents and signatures with tamper-evident seals. These seals are visible from most PDF viewers including **Adobe Reader** (see Adobe Reader - <https://support.docusign.com/en/guides/ndse-user-guide-sending-digital-certificates>) and **BlueBeam** (see BlueBeam - <https://support.bluebeam.com/online-help/revu2018/Content/RevuHelp/Tutorials/Digital-Signatures.htm>), as shown below.



Each document signed in TPM using DocuSign will be now include the tamper-evident seal. This seal allows confirmation of the following, without returning to TPM to review a vaulted copy of the document:

- ▶ The document has not been modified or tampered with since the signature was applied
- ▶ The signer's identity is valid
- ▶ The time of the signature was recorded properly.

Additionally, DocuSign provides this online utility you can use to verify a document signed on their platform: <https://validator.docusign.com/> (see <https://validator.docusign.com/> - <https://validator.docusign.com/>).

Note: Documents downloaded individually from the TPM application will contain the tamper-evident seal. However, documents combined into a single PDF, as from the **Print Draw Documents** page, will not contain the DocuSign seal on the resulting PDF.

Certificates of Completion

In addition to the tamper-evident seal that accompanies each document, DocuSign also provides a court-admissible, digitally signed, and tamper-evident **Certificate of Completion** (see Certificate of Completion - <https://support.docusign.com/en/guides/ndse-user-guide-history-coc>) that contains a comprehensive audit trail for each envelope which includes:

- ▶ Signing parties' names
- ▶ Digital signatures
- ▶ Public IP addresses
- ▶ Signing location (if provided)
- ▶ Chain of custody (sent, viewed, signed, etc.)
- ▶ Timestamps.

Unlike the historic documents signed on TPM using Pronto, the documents signed using DocuSign do not contain an embedded link you can use to access the audit trail and vaulted copy of the document.

To facilitate review of the detailed audit trail associated with any DocuSign envelope signed on TPM, TPM will provide several mechanisms to retrieve the DocuSign Certificate of Completion for a specific envelope signed on the platform. First, Certificates of Completion will be available for download from the **Payment Due Date**, **Generate Document Archive**, and **Invoice Control Log** page in TPM. Second, you can access a new publicly accessible portal at <https://cpm.texturacorp.com/docusign> (see <https://cpm.texturacorp.com/docusign> - <https://cpm.texturacorp.com/docusign>) to download a tamper-evident Certificate of Completion using the Envelope ID printed on each document.

In an upcoming release, the Certificate of Completion will also be added to the **Print Draw Documents** page you can download the document in bulk if required.

Note: To ensure the enforceability of all documents signed on TPM using Pronto, Oracle will continue to support access to the vaulted copy of each document and the signature audit information linked to from documents signed on TPM via Pronto for 10 years from the signing date of the document.

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Frequently Asked Questions

I cannot bill or sign any documents

You may not have the correct user permissions or project roles to perform these actions. If you are an Enterprise or Local Administrator, you can review and update your user permissions on the **User Profile**. To invoice, you need the **Manage Projects** permission. If you are managing compliance documentation you need the **Manage Compliance** permission. To sign documents, you need the **Sign on Behalf of the Company** permission.

If your user permissions are correct, review the user permissions assigned to you for the project.

- 1) From the **Project Setup** menu at the top of the **Project Home** page, select **User Roles**.
- 2) On the **User Roles** page, ensure you have the following user role assigned to you, depending on which action you need to perform:
 - ▶ **Project Manager**: Assign or reassign project responsibilities, whether or not they are Administrators
 - ▶ **Compliance Manager**: Manage document compliance
 - ▶ **Signer**: Sign project documents on behalf of the company, including the lien waiver.

In order to invoice on TPM, you need at least one user in your organization assigned to each role.

Note: Only Enterprise Administrators, Local Administrators, and users who were already assigned the Project Manager (PM) user role can assign user roles. If you are not an administrator for your organization or a PM for the project on TPM and you need to be assigned one of these roles, contact an administrative Textura user in your organization or the project's PM for assistance.

- 3) If you are already a PM or an Administrator, select the Signer user role to allow yourself to sign documents.
- 4) When finished selecting your desired user roles, select the **Save** button.

I do not see any open draws to submit my invoice

Contact your General Contractor organization to confirm they opened the draw. Your General Contractor can invite you to submit your invoice when the draw opens.

I missed the cutoff date to enter my invoice

Contact your General Contractor organization to see if they can invite you to submit your invoice for the current draw. They may be able to submit the invoice on your behalf or you can submit it in the next open draw.

I submitted my invoice but need to adjust my final amounts

Once your organization fully submits an invoice, only the approving organization—often the General Contractor—can adjust the amounts in the same draw period. Try contacting your approving organization to see if they can adjust your invoice.

If your invoice cannot be updated during the present draw period, you can bill against the incorrect amounts in a future period.

What happens if the General Contractor rejects my invoice?

Textura will send an email notifying all Project Managers for that project that the invoice was rejected by the General contractor. The email should include a detailed reason for the rejection. The rejected invoice will then need to be re-signed and resubmitted.