



OWNER HELP DOCUMENT

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Please keep in mind that your builder may not be utilizing all of the options listed below, but this document will highlight all possibilities.

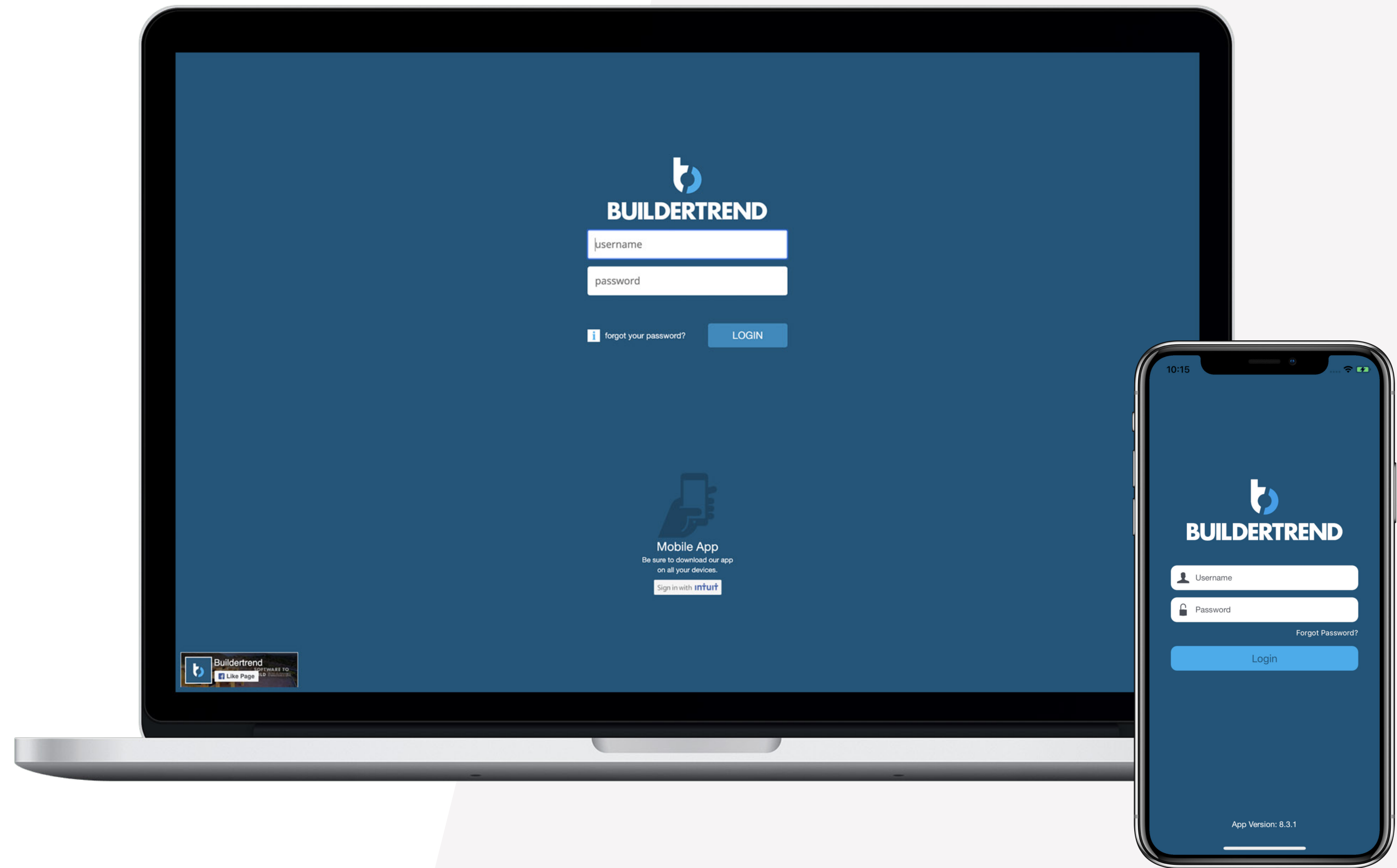
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LOGGING INTO BUILDERTREND

If you have been invited to participate with your Builder via email; you will be able to set up your own username and password. Your builder may create a username and password for you. Feel free to login once you have your credentials.

You can download the Buildertrend mobile application within the App Store for iOS devices or the Google Play Store for Android devices. You will use the same username and password to login to Buildertrend on the web, as well as the mobile app.

The features and functionality on the mobile application is the exact same as on your computer, so feel free to browse your job information while you're on the go.



NAVIGATING BUILDERTREND

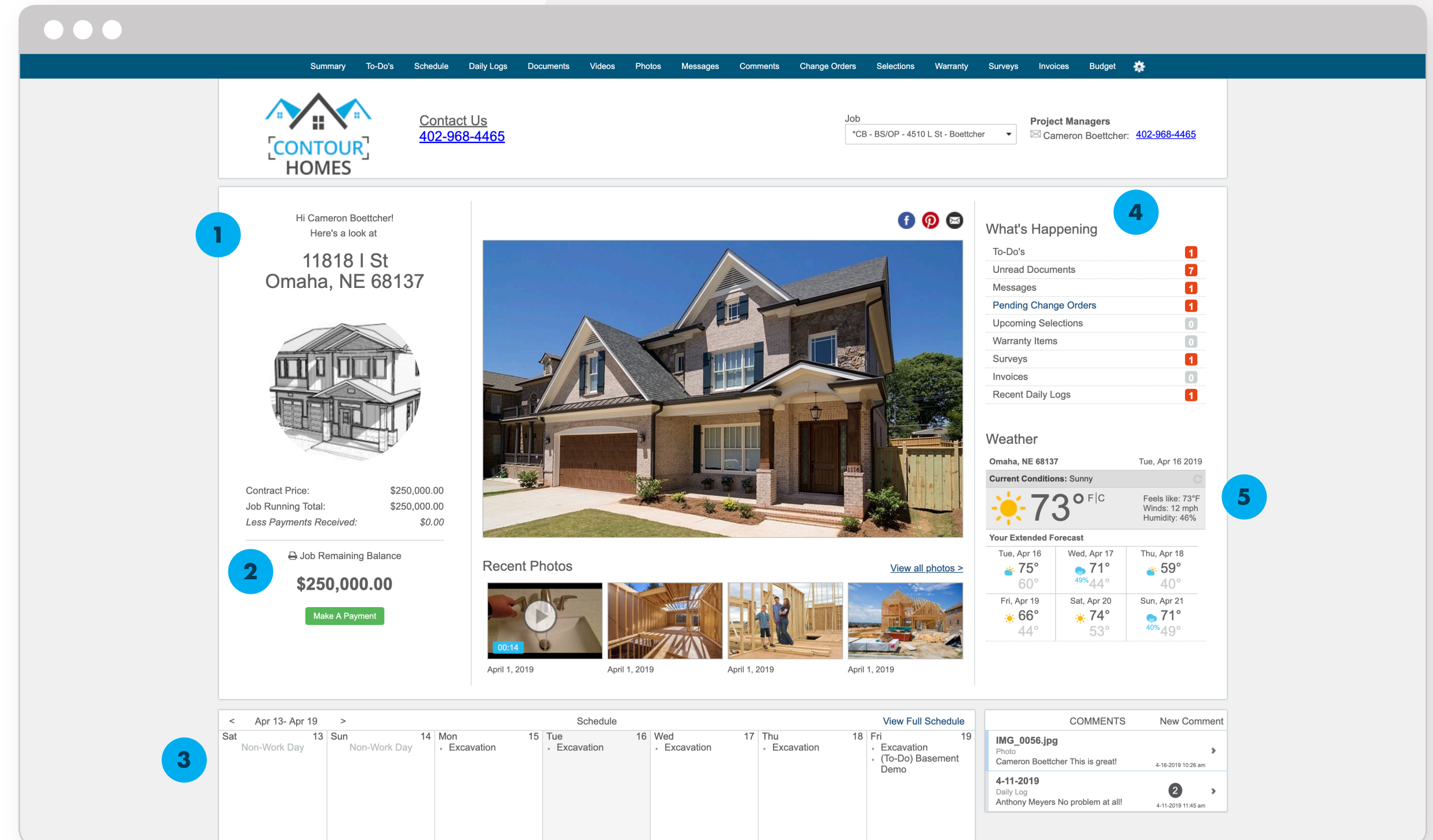
1 While on your initial Summary page, you have access to your price summary on the left. This will show your agreed upon contract price with your builder, any change orders you may have, as well as your selection choices. Taking all of these into consideration; this will give you a running total of your job.

2 You also have access to see what you have paid, to date. If you want to see an itemized list of this summary, please click your Job remaining balance.

3 Below your Job Price Summary, you have quick access to a week view of the schedule at the bottom, and are one click away from viewing the entire schedule.

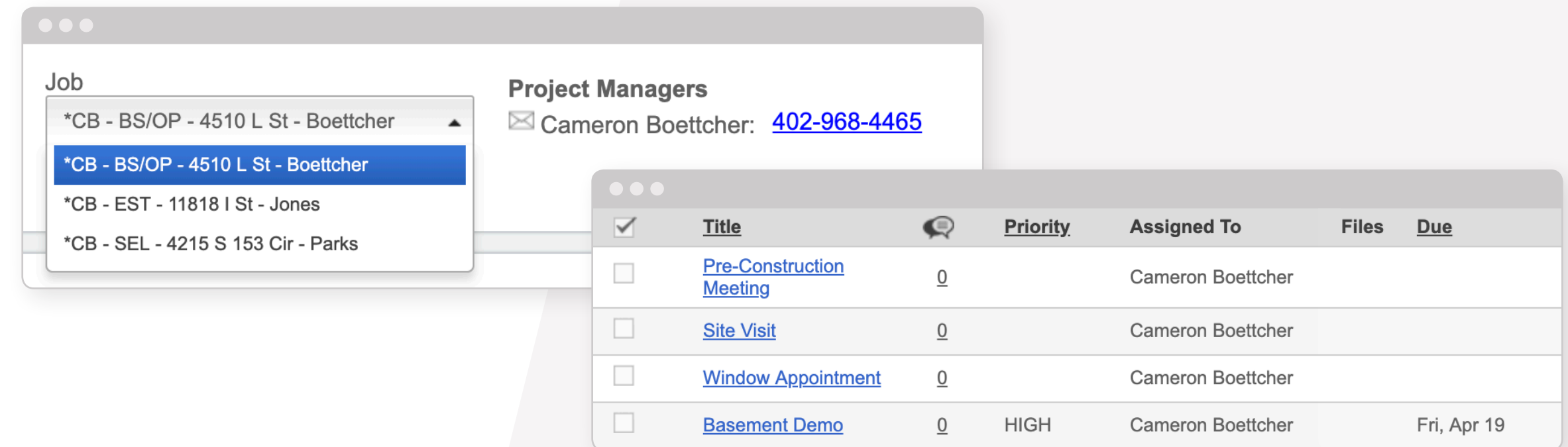
4 On the right side of the screen, you have access to a dashboard which will keep you in the know as to “What’s Happening” with your job. From here, you can quickly see any items that have been added for you to view, as well as take action. You can click the links to go directly to that specific feature.

5 Beneath your “What’s Happening” dashboard, you can see the weather report for the ZIP/Postal code of the job, as well as see your most recent comments.



MULTIPLE JOBS

If you are doing more than one job with your builder, you have the ability to toggle between your different jobs, in order to see the information for each. You will only need one username and password to log in, and access to all job will be available to you.



TO-DOS

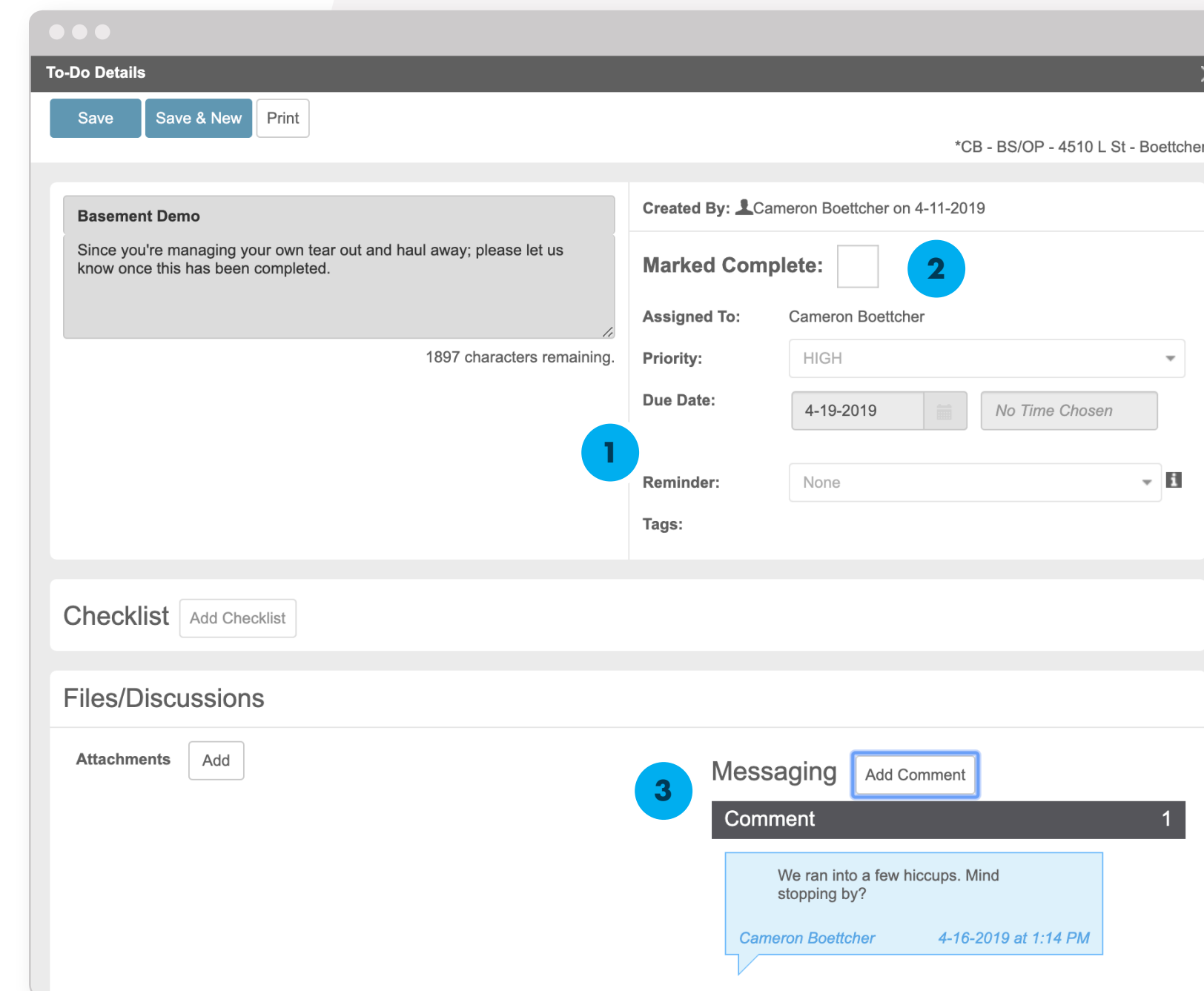
Within this feature, you will be able to access the To-Dos that your Builder has assigned to you. You can also create To-Dos for yourself. The To-Dos you create are only for you, and cannot be assigned to your builder. This can be a great way to manage different items that you need to take care of throughout your project while keeping all of your project information together.

When creating a To-Do, if you select a due date you can then set up a reminder which will send a notification to you; a reminder of the coming deadline. There is an option to create a checklist of items within a To-Do, as well. If there are checklist items, you can individually mark those off as they are completed.

Once the entire To-Do is complete, you can mark the To-Do as complete in the top right-hand corner. This action will notify your builder. All To-Do's that have a due date will also populate within the Schedule feature for easy viewing access along with other important deadlines, such as Change Orders, Selections, etc., for your job.

If you have any questions or comments regarding a To-Do that has been assigned to you, use the "Add Comment" button to send a notification with your question or comment to your builder.

- 1
- 2
- 3



SCHEDULE

The Schedule will display all of the key due dates that pertain to your project along with schedule information. You have an option to view the schedule in a month, list or Gantt format. This can be chosen in the top left-hand corner.

The schedule information will be filled with color, while any of the additional items (Change Order deadlines, Selection deadlines, etc.) will show with their respective symbol and the title of the item. To view more information, click on the item and the page will open.

The screenshot displays a web-based project schedule interface. The main window is titled "Schedule" and features a "Print" button and a "FILTER YOUR RESULTS" dropdown. Below these are tabs for "Schedule", "List", and "Gantt", along with a "Large Text" toggle. The calendar view shows the month of April 2019, with days of the week (Sun-Sat) and dates (31-2) visible. Tasks are represented by colored bars: "Permits" (brown), "Lot Clearing" (dark blue), "Excavation" (dark red), and "Pour Footers" (dark red). A "Non-Work Day" is indicated by a grey hatched pattern. An "Owner Daily Log Details" window is overlaid on the right, showing "Daily Log Information" for April 11, 2019. It includes a "Print" button, "Date: 4-11-19", "Notes" (e.g., "Made a lot of good progress today..."), weather information (50° F, 42° F), and an attachment "carpet pad.jpg". The "Discussions" section shows two comments: "No problem at all!" from Anthony Meyers and "Thank you for taking care of this!" from Cameron Boettcher.

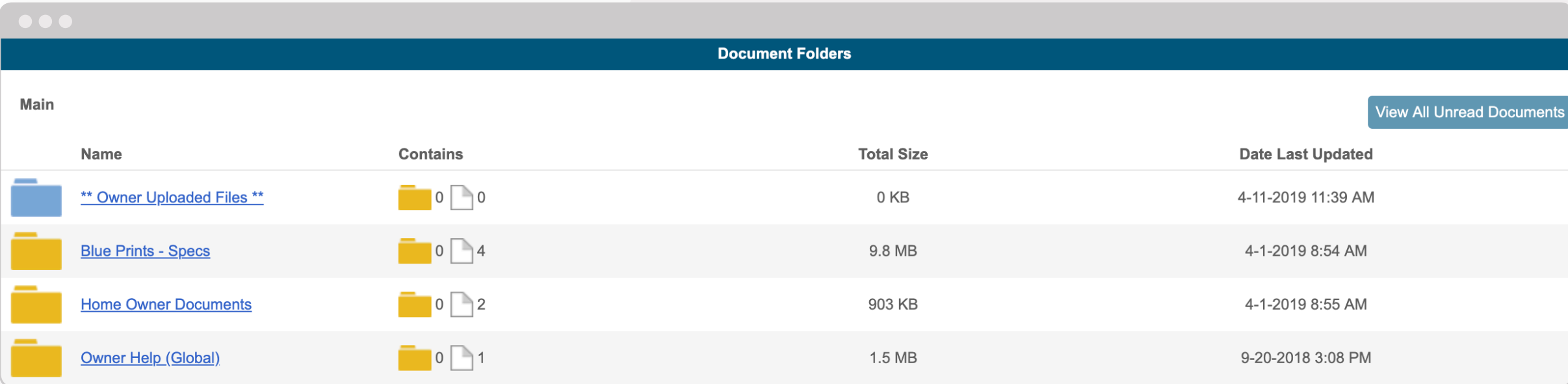
DAILY LOGS

Daily Logs provide progress reports from you builder, alleviating additional phone calls and emails. These will be easy to understand progress reports that streamline communication, as well as keep you informed every step of the way. As always, if you have questions or comments, please feel free to leave a comment on the Daily Log itself.

DOCUMENTS

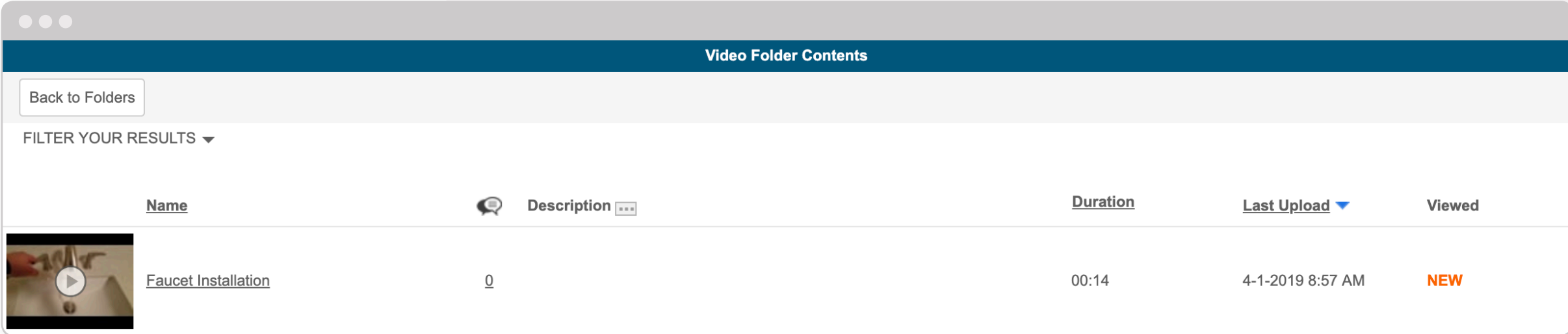
You can access any documents that your builder has shared at any time. To view the document, please click on the folder, then the document to view.

You can easily upload any of your own documents to the "Owner Uploaded Files" folder. If you go into this folder, you can click the "Add Documents" button which will take you to our upload screen where you can drag and drop documents in, or search your computer. When the documents have been added, click "Upload", in the bottom right, to complete this process.



VIDEOS

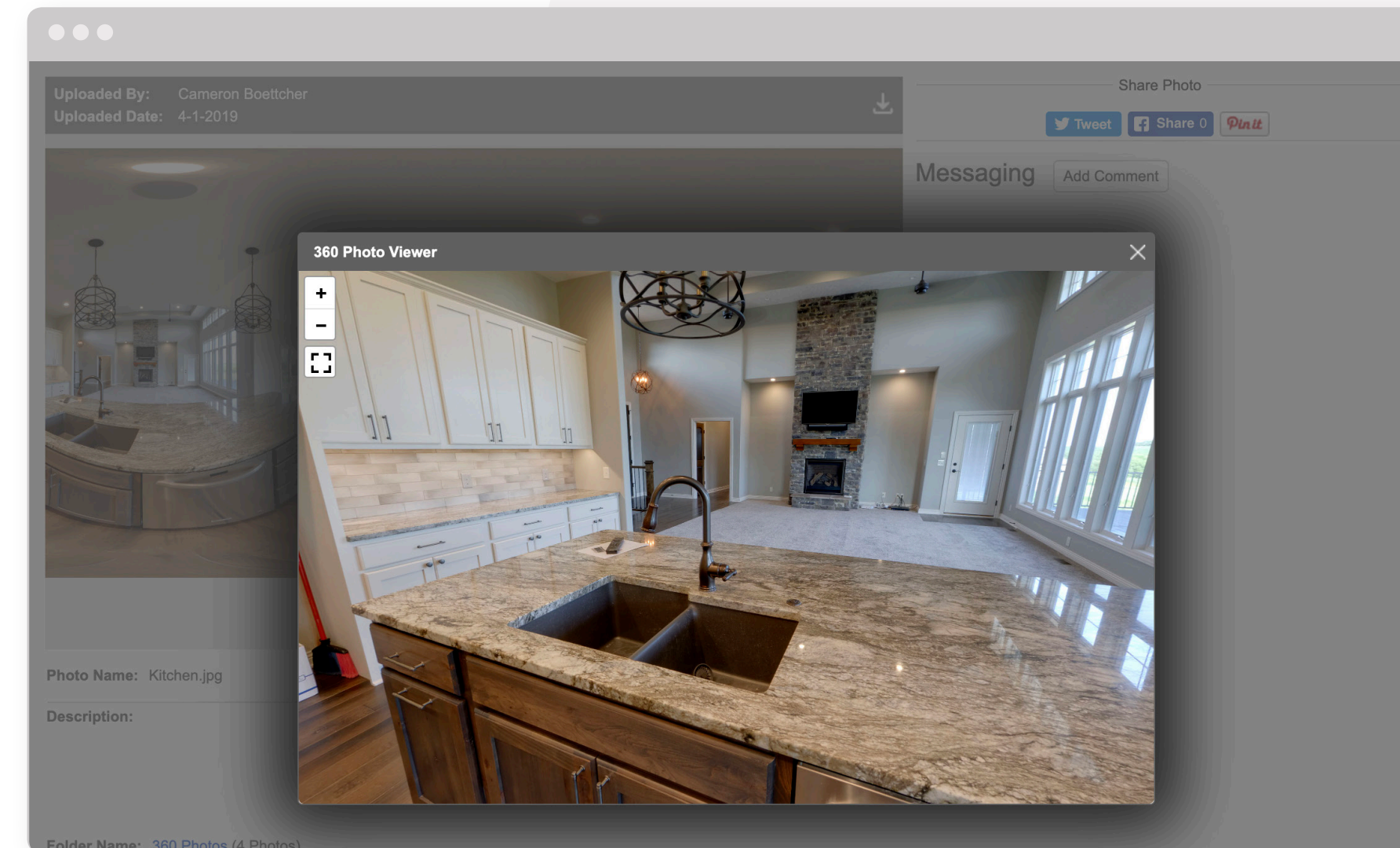
For videos, you can access any progress videos that have been shared with you. The workflow is similar to viewing documents.



PHOTOS

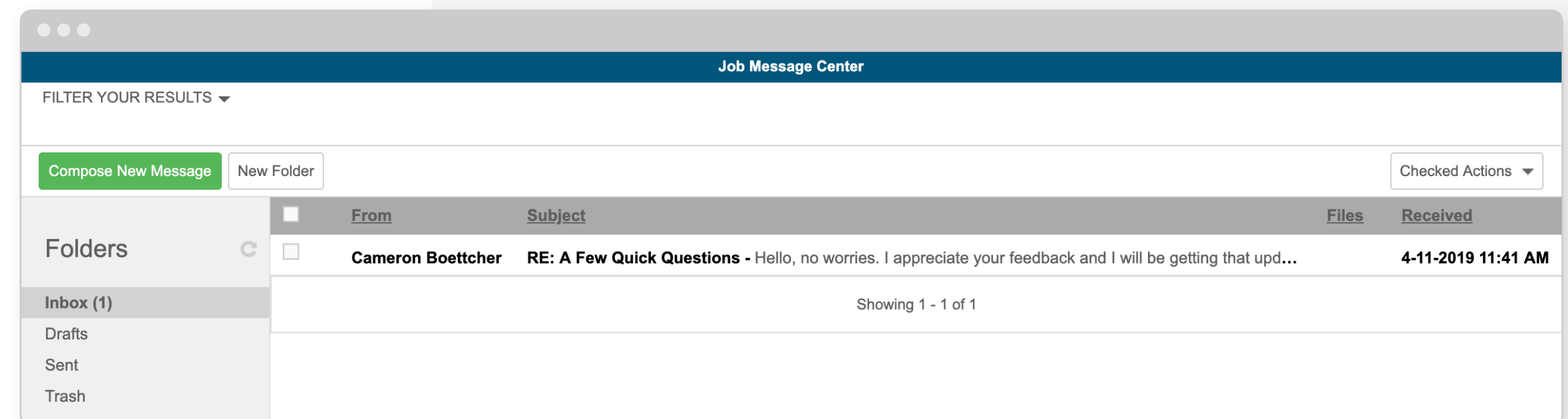
The photos feature will be a place of reference as to see what is going on with the job. You can easily click into folders and view photos, as well as add your own photos to the appropriate folder, using the same workflow as uploading documents.

If you'd like to share any of the photos of your project on social media, you can do so after opening the photo and using the social media links in the top right-hand corner.



MESSAGES

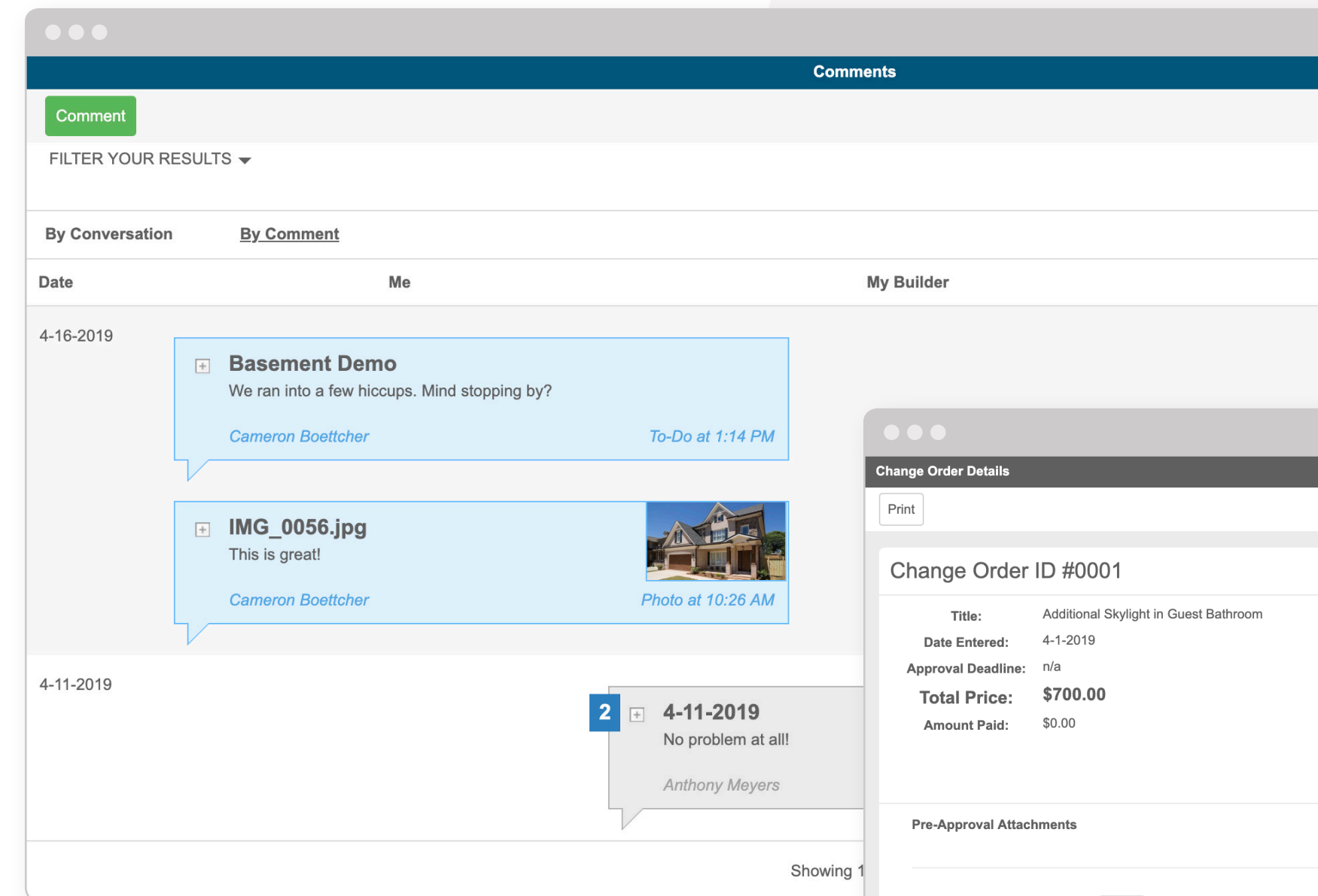
The messages feature is where you can easily message your builder, similar to email. All messages will be logged in Buildertrend for your reference. You can send a message by clicking the "Compose New Message" option, and select the particular individual you're wanting to send a message to. You can send a message to an external party by clicking the "Plus" icon next to the "To:" dropdown.



COMMENTING

The comments tab will allow you to view any of the comments that have been applied to items on your project without having to find the specific item the discussion originated within. You can reply back to comments by using the “+” button in the top left-hand corner of a comment. If you need to review the item before commenting you can click on the bolded title of the comment. This will open the specific item the discussion was originally applied to.

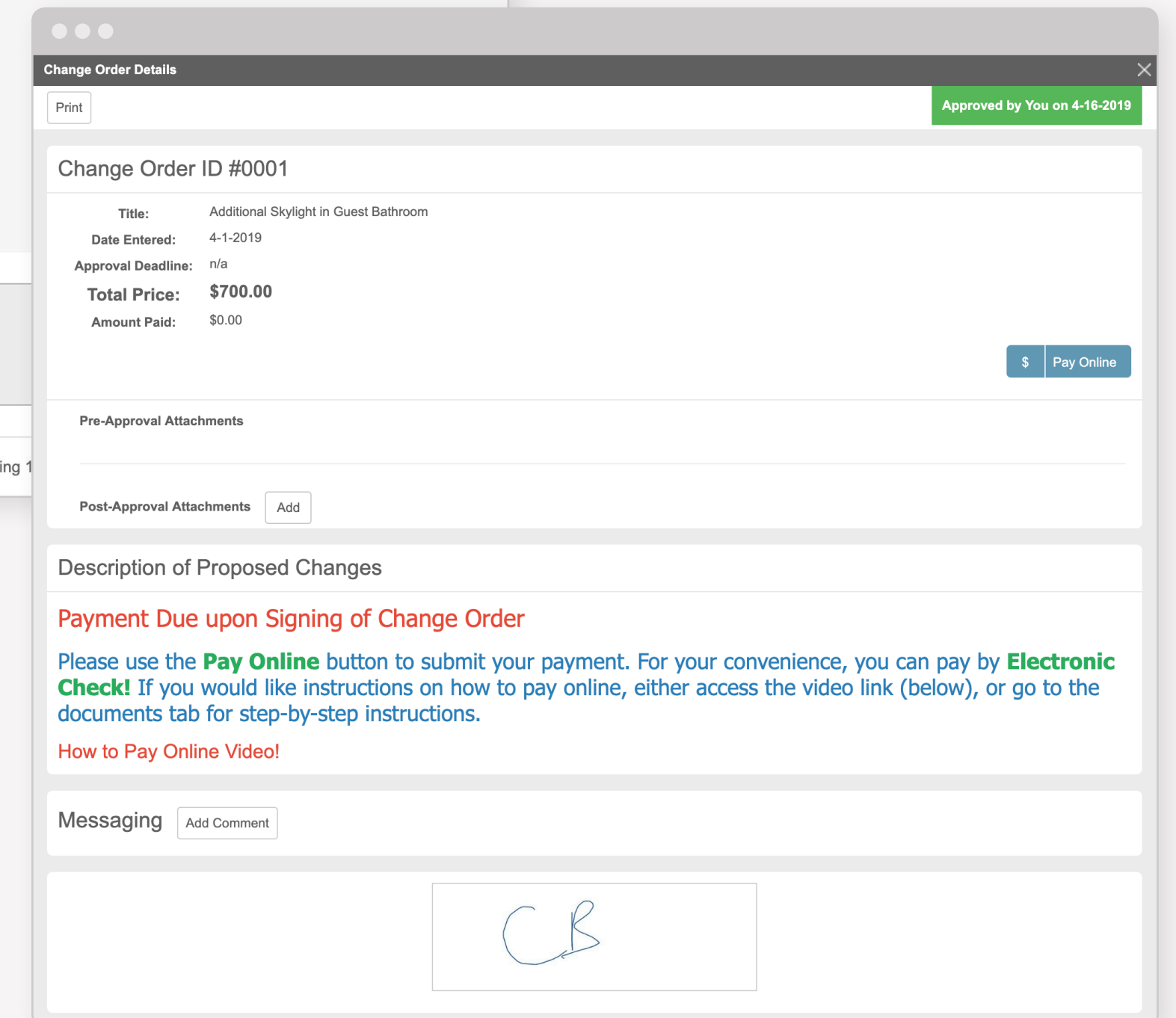
Comments are similar to text messages, except comments are logged within Buildertrend for a historical record of all correspondence.



CHANGE ORDERS

You can formally request a change by clicking the “New Change Order” button. This is an item that wasn’t outlined in your original contract with the builder, and will now be handled as a change order. Change Orders that you request, or Change Orders that your builder enters into the program for you, can be accessed within this feature for your management, review, and final approval.

If your builder is set up for online payments, you can pay your builder through Buildertrend. Setup is quick and easy, and will streamline this process.



SELECTIONS

In the selections tab, you will be able to reference any choices that need to be made for your job. There are multiple views that can be used to reference this information. Each showing the same information in a different layout.

While working through your selections you have an option to favorite choices before approving by using the star icon. This will allow you to see how this choice will affect your budget before having to approve the choice. You can favorite multiple choices and then use the "Favorites" section in the top middle of the page to review pricing and then approve all favorited choices or specific choices that have been favorited.

In order to approve a choice that has not been favorited you can either click on the choice title or the checkmark available within the overall view of all selections. This will open the choice details where you can review all information before checking the disclaimer and confirming your approval.

Key Terms

Selection - groups of choices that are organized by category, location and allowance.

Choice - specific item(s) that can be chosen for the project within each selection.

Allowance - an amount specified and included in the construction contract for a certain item of work (e.g., appliances, lighting, etc.) whose details are not yet determined at the time of contracting.

The screenshot displays a software interface for managing project selections. At the top, a summary bar shows: Job Running Total \$244,339.78, Favorites \$7,422.50 (with 2 stars), and Projected Total with Favorites \$236,762.28.

The main content is divided into two sections: "02 - Carpet" and "03 - Appliances".

02 - Carpet: This section lists four carpet options, each with a thumbnail, title, price, and description. All items are marked as "Pending".

- Phenix Carpet Sonata Carpet in...:** \$2,928.00. Description: "The Sonata carpet from Phenix Carpet is not only an unforgettable flooring option."
- Shaw Change In Attitude Carpe...:** \$3,468.00. Description: "The Change In Attitude carpet perfectly represents the Queen Carpet which..."
- Phenix Carpet Beale Street Car...:** \$3,864.00. Description: "The Beale Street collection features an incredibly soft feel merged with the best..."
- Shaw Possibilities II Carpet in D...:** \$4,128.00. Description: "Warm up rooms and reduce energy bills with the natural insulation and comfort of..."

03 - Appliances: This section shows one selected item:

- GE Appliances 4-Piece Kitchen...:** \$2,699.00. Description: "This GE 4-Piece Package Range/OTR Microwave/Dishwasher/Refrigerator will give your kitchen a makeover. This set includes a..."

An inset window titled "Selection Choice Favorites" provides a "Favorites Summary" with two items:

- French Oak Cognac Hardwood Flooring:** Price: \$3,294.50, Selection: 04 - Flooring, Category: 06 - Flooring, Location: Kitchen. Remaining Allowance: Flooring \$15,000.00 / \$15,000.00.
- Shaw Possibilities II Carpet in Damask:** Price: \$4,128.00, Selection: 02 - Carpet, Category: 06 - Flooring, Location: Upstairs. Remaining Allowance: Flooring \$15,000.00 / \$15,000.00.

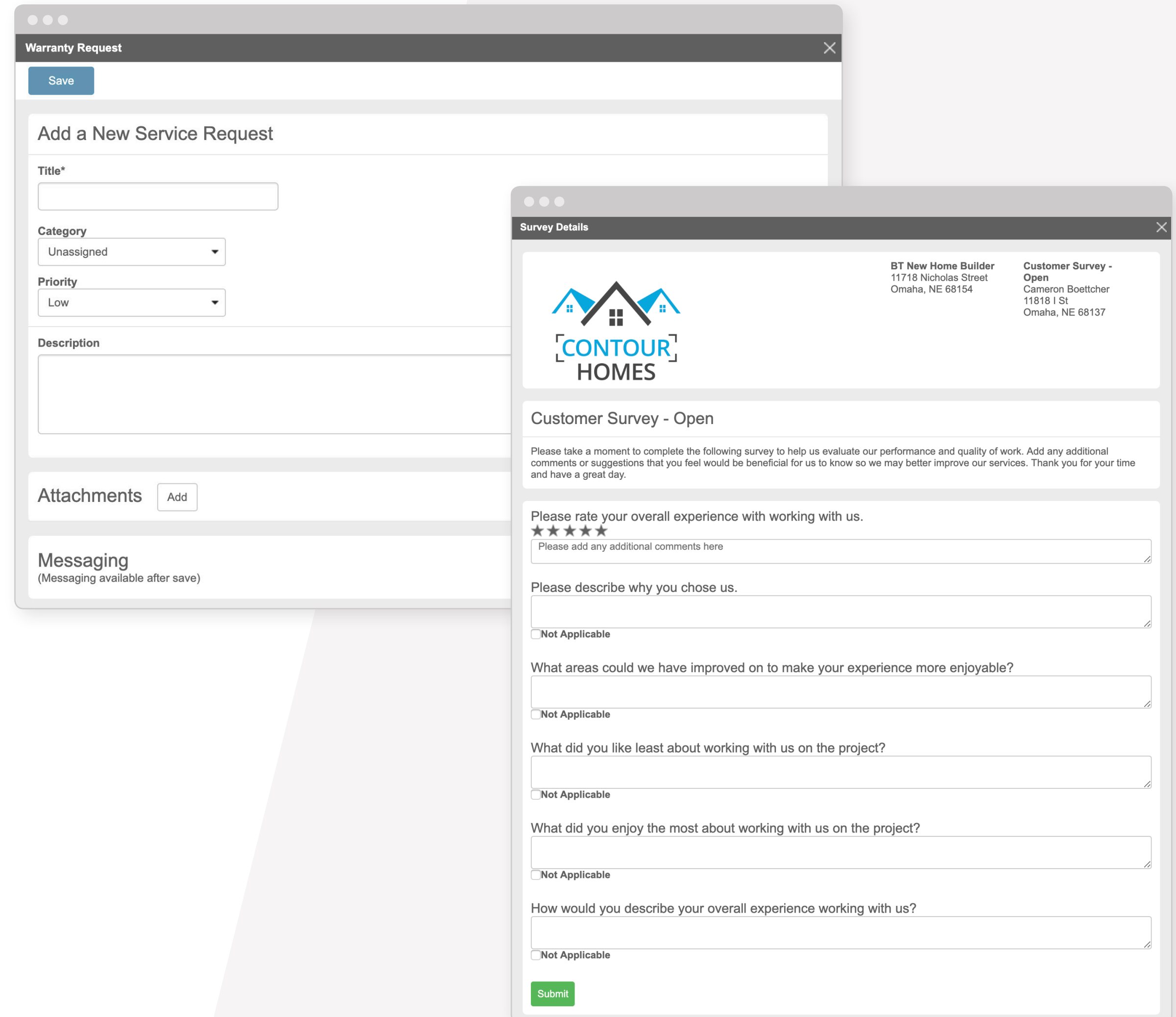
At the bottom of the inset window, there is a summary bar (Job Running Total \$244,339.78, Favorites \$7,422.50, Projected Total with Favorites \$236,762.28) and an "Approve All Favorited Selection Choices" form. The form includes an "Additional Comments" field (500 characters remaining), a "Disclaimer" section with a checkbox for "I confirm that my action here represents my electronic signature and is binding.", and an "Approve All" button.

WARRANTY

The warranty tab will allow you to view any warranty claims that have been added along with service appointments that have been scheduled to take care of the claims. Your builder may also give you the ability to add warranty claims up to a certain date by using the "New Claim" button in the top left corner. Once a service appointment has been performed you will also be able to provide feedback to your contractor by clicking on the "Feedback Required" link.

SURVEYS

In the surveys tab, your builder will have the option to send surveys to you, in order to gather feedback throughout the life of the job.



INVOICES

The Invoices tab is where you'll be able to view any progress invoices or change orders that have been paid or still need to be paid. If your builder is using the online payments feature available within Buildertrend, you will see an option to pay online on the right-hand side of any unpaid items.

Invoices Make A Payment

ID#	Title	Files	Deadline	Invoice Amount	Amount Paid	Invoice Balance	Date Paid	Payment Status
INV-0001	Draw #1	0		\$25,000.00	\$0.00	\$25,000.00		⏸ Pending \$ Pay Online
Totals				\$25,000.00	\$0.00	\$25,000.00		

Change Orders

ID#	Title	Files	Deadline	Price	Amount Paid	Invoice Balance	Date Paid	Payment Status
C/O-0001	Additional Skylight in Guest Bathroom	0		\$700.00	\$0.00	\$700.00		⏸ Pending \$ Pay Online
Totals				\$700.00	\$0.00	\$700.00		

Invoice Amount Total	\$25,700.00
Amount Paid Total	\$0.00
Remaining Invoice Balance	\$25,700.00

*Pending COs have been [excluded](#) ⓘ

BUDGET

Depending on the type of builder you are working with, you may be granted access to view the internal budget and purchase orders. This will allow you to see the internal budget in real time, saving quite a few phone calls.

Budget - (*CB - EST - 11818 | St - Jones)

Budget Bills/POs

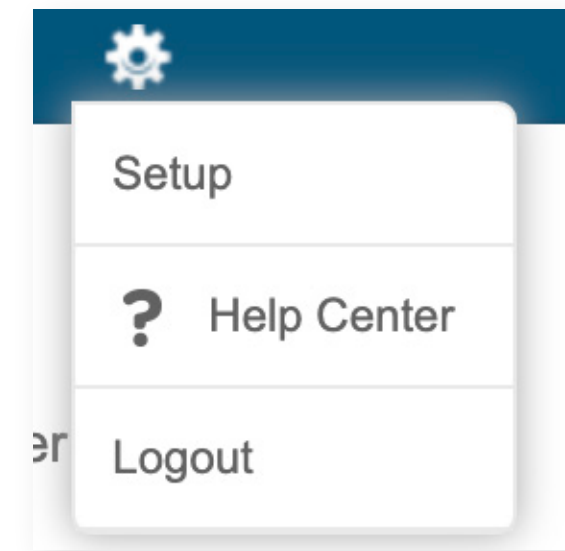
Collapse All

Code	Estimates	New Expected	Bills/POs	Time Clock Labor	Builder Variance	Total Bill/PO Cost	Customer Variance	Total Costs	Paid	Outstanding
<input type="checkbox"/> 1000 - 1999 Preparation Preliminaries										
1000 - Dumpster	\$390.00	\$390.00	\$0.00	\$0.00	\$0.00	0%	\$0.00	\$0.00	\$0.00	\$0.00
1010 - Building permits	\$800.00	\$800.00	\$0.00	\$0.00	\$0.00	0%	\$0.00	\$0.00	\$0.00	\$0.00
1110 - Blueprints	\$2,500.00	\$2,500.00	\$0.00	\$0.00	\$0.00	0%	\$0.00	\$0.00	\$0.00	\$0.00
1300 - Demolition	\$0.00	\$0.00	\$0.00	\$280.00	\$0.00	0%	\$0.00	\$280.00	\$280.00	\$0.00
<input type="checkbox"/> 2000 - 2999 Excavation and Foundation										
2010 - Plumbing—ground	\$4,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/> 3000 - 3999 Rough Structure										
3300 - Windows	\$10,000.00	\$10,000.00	\$0.00	\$0.00	\$0.00	0%	\$0.00	\$0.00	\$0.00	\$0.00
3720 - Plumbing—rough	\$4,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/> 5000 - 5999 Finishing Trades										
5400 - Cabinets and vanities	\$10,500.00	\$10,500.00	\$0.00	\$0.00	\$0.00	0%	\$0.00	\$0.00	\$0.00	\$0.00
5710 - Plumbing—final	\$4,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	\$0.00	\$0.00	\$0.00	\$0.00
TOTALS:	\$36,190.00	\$24,190.00	\$0.00	\$280.00	\$0.00	0%	\$0.00	\$280.00	\$280.00	\$0.00

SETUP

From the gear icon in the top right, you can edit your login information, upload a display photo for your account, as well as opt in to receive text message notifications. You have the option to setup guest access to Buildertrend for any friends or family. This will give them the ability to view progress photos and the schedule for your project.

The guest accounts will not have access to financial information, nor will they be able to legally approve anything. Their credentials will be your UserID, and whatever password you create for them.



SUPPORT

If you have any questions or issues with your Buildertrend account feel free to reach out to our support department. We can be reached by phone at 1-888-415-7149 or by email: support@buildertrend.com.