

# 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.

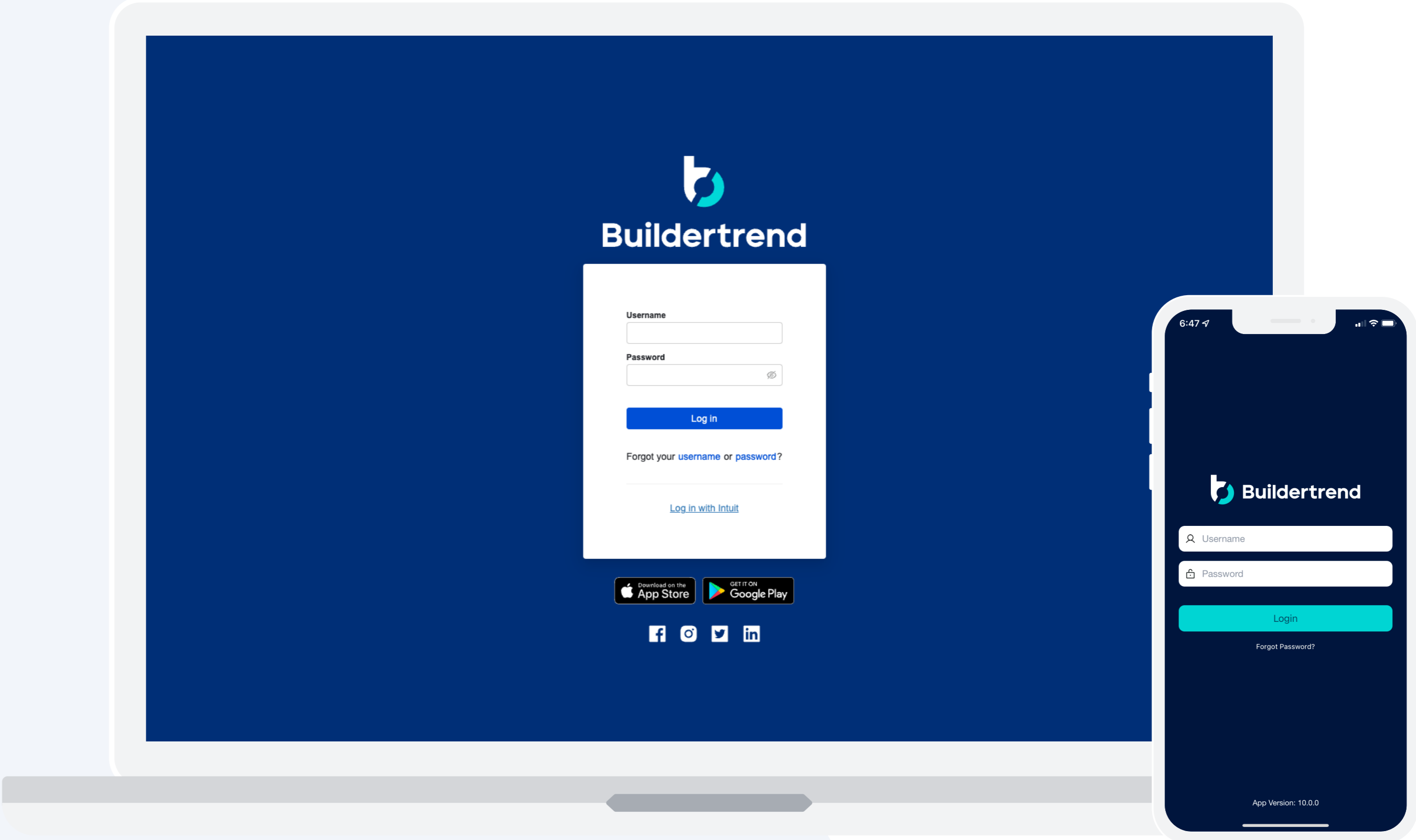
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# Logging in to Buildertrend

If you've been invited to participate with your builder via email, you'll be able to set up your own username and password. Your builder may create a username and password for you. Feel free to log in once you have your credentials.

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

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



# Navigating Buildertrend

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

2 You also can see what you've already paid to date. If you want to see an itemized list of this summary, please click your job's remaining balance.

3 Below your Job Price Summary, you can quickly view the current week's schedule. To view the full schedule, simply click **View full schedule**.

4 On the right side of the screen, you can access the dashboard that will give you a complete summary of what's happening with your job. This is where you can stay up to date on your notifications and complete tasks assigned to you by your builder.

5 Quickly access project information, assigned tasks and documents in the search bar.

The screenshot shows the Buildertrend Summary page for a project named "Smith Custom Home". The page is divided into several sections:

- Header:** A blue navigation bar with "Project Management", "Files", "Messaging", and "Financial" menus. A search bar is located on the right.
- Left Panel (Callout 1):** A "Job Price Summary" table with the following data:

Item	Amount
Contract Price	\$383,385.00
Change Orders	\$807.50
Selections Made	\$33,250.00
Job Running Total	\$417,442.50
Less Payments Received	\$0.00
<b>Balance</b>	<b>\$417,442.50</b>
- Center (Callout 2):** A large photo of a modern house with a green lawn. Below it are "Recent Photos" and a "Schedule" section.
- Right Panel (Callout 4):** A "What's Happening" dashboard with a list of tasks and their counts:
  - Recent Daily Logs: 0
  - Incomplete To-Do's: 1
  - Pending Change Orders: 2
  - Upcoming Selections: 0
  - Unread Documents: 11
  - Unread Messages: 0
  - Incomplete Surveys: 1
  - Upcoming Invoices: 0
  - Warranty Items: 0
- Bottom (Callout 3):** A calendar for December showing the current week's schedule. The days are Sunday (11, Non-workday), Monday (12), Tuesday (13), Wednesday (14), Thursday (15), Friday (16), and Saturday (17, Non-workday).



# Multiple Jobs

If you're 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'll only need one username and password to log in and access all jobs available to you.

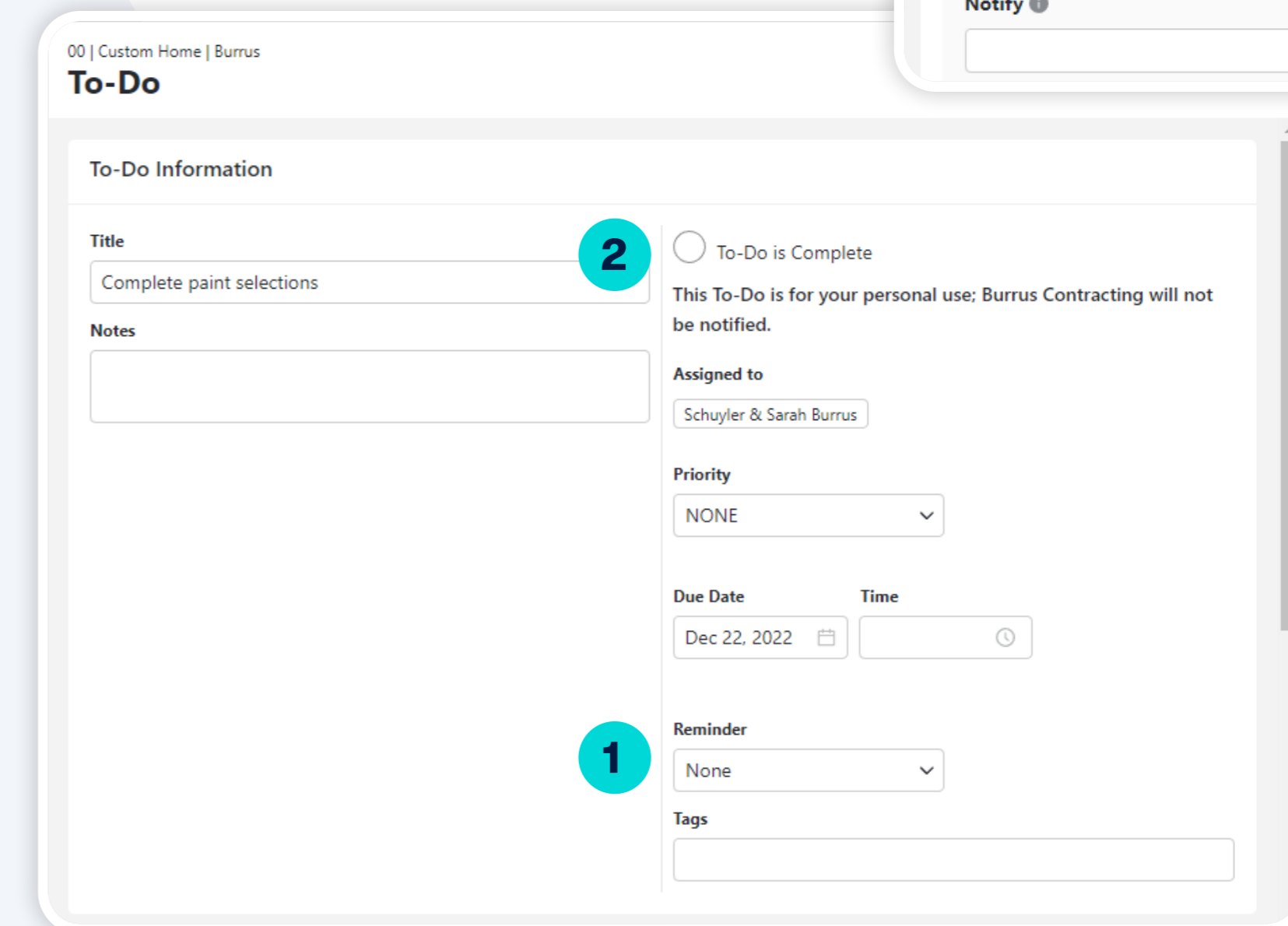
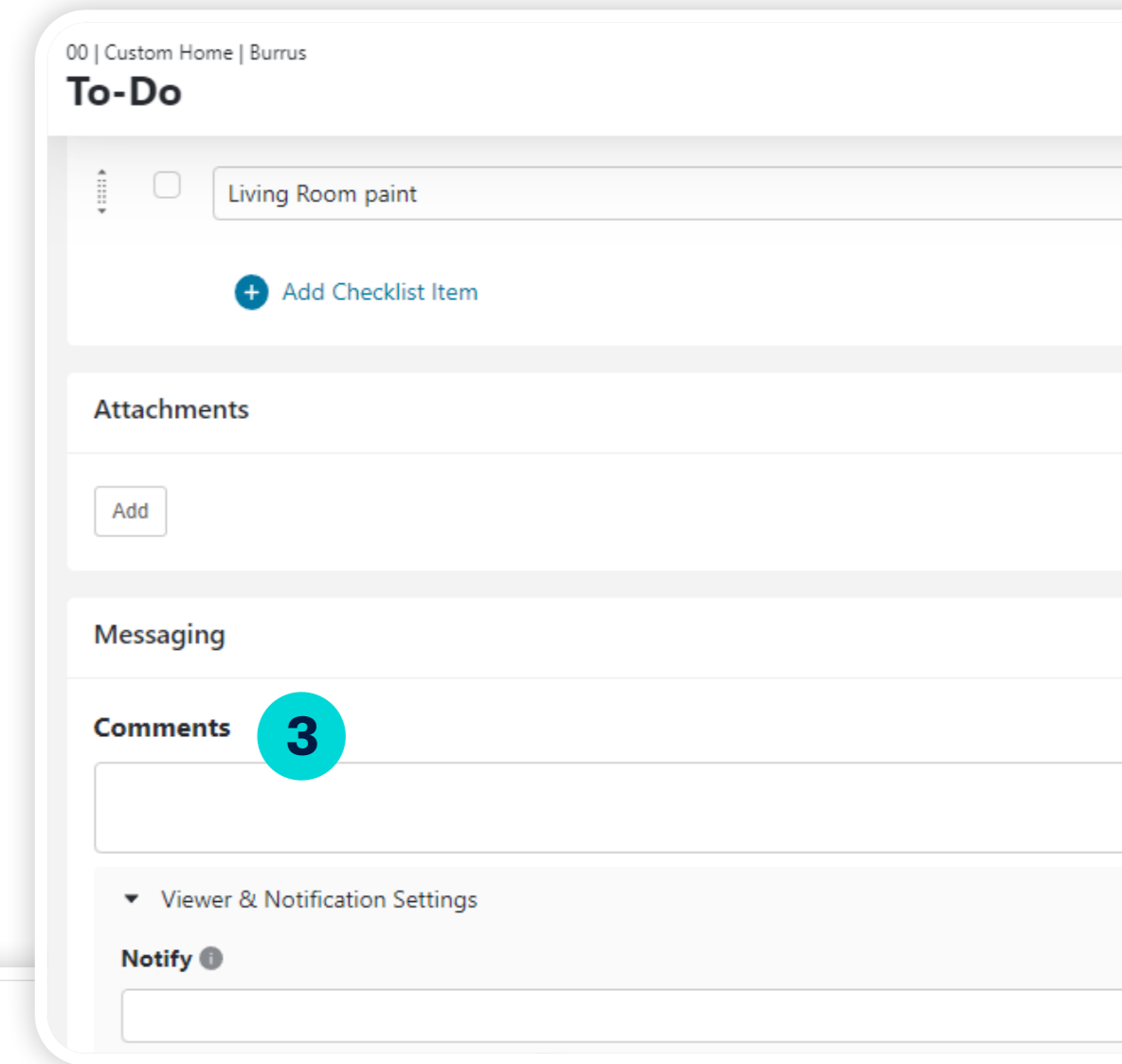
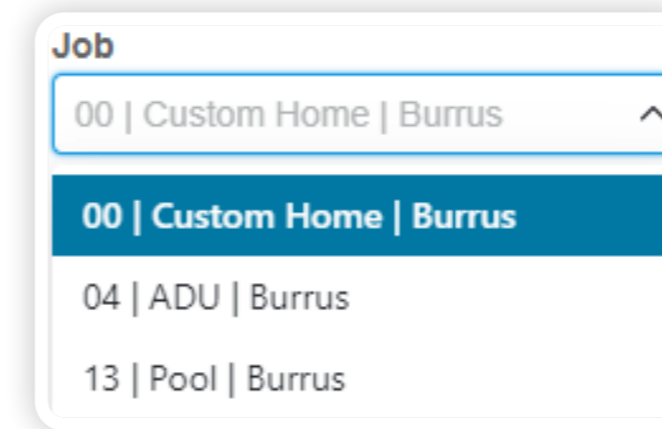
## To-Do's

Within this feature, you'll be able to access the To-Do's that your builder has assigned to you. You can also create To-Do's for yourself. The To-Do's 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'll get a notification to remind you of the coming deadline. There's 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're completed.

Once the entire To-Do is complete, you can mark the it 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. This will include important deadlines for things like change orders and selections for your job.

If you have any questions or comments regarding a To-Do that's been assigned to you, add a comment to send a notification to your builder.



**Buildertrend**



# 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-coordinated items, 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.

# Daily Logs

Daily Logs provide progress reports from your 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. If you have questions or comments, you can leave a comment on the Daily Log itself.

The screenshot displays the 'Schedule' interface in Gantt format. At the top, there are tabs for 'Calendar', 'List', and 'Gantt', with 'Gantt' selected. A 'Filter' button is on the right. Below the tabs, there's a 'Day' dropdown set to 'Today' and icons for zooming and refreshing. The main area shows a Gantt chart for 'Week 19' (May 30 to May 8). A table on the left lists tasks with their start dates and durations. A 'Daily Log Details' modal is open, showing information for a log entry on Sep 13, 2022. The modal includes sections for 'Daily Log Information', 'Weather', 'Related To-Do's', 'Attachments', and 'Messaging'. The 'Attachments' section shows four image thumbnails.

Title	Start	Workdays	Apr 30	May 1	May 2	May 3	May 4	May 5	May 6	May 7	May 8	M
Footings	Mar 1, 2022	5 days										
Foundation	Mar 8, 2022	6 days										
HVAC Rough In	Apr 20, 2022	17 days										
Plumbing Rough In	Apr 22, 2022	19 days										
Apply Sheathing	Apr 25, 2022	4 days										
Install Roof	Apr 26, 2022	13 days										
House Wrap	Apr 29, 2022	2 days										
Exterior Doors	May 3, 2022											
Install Windows	May 3, 2022											
Exterior Masonry	May 6, 2022											
Install Siding	May 10, 2022											
Insulation Install	May 17, 2022											
Painting-Exterior	Jun 10, 2022											
Flatwork	Jul 1, 2022											

**Daily Log Details**

Print Bolt Home

Added By: Sam Johnson  
On: Sep 13, 2022, 11:08 AM

Date: Sep 13, 2022

Notes: I just installed kitchen cabinets check out our photos below for details

**Weather**

Sunny  
67° F  
50° F  
Wind: 10 mph  
Humidity: 93%  
Total Precip: 0"  
Tue, Sep 13, 2022, 11:07 AM

**Related To-Do's**

No related To-Do's

**Attachments**

View All (4)

IMG\_0003.JPG IMG\_0001.JPG IMG\_0005.JPG IMG\_0004.JPG

**Messaging**

Comments

Viewer & Notification Settings

# 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.

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. This 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

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


**Documents** View All Unread Documents ☰

<input type="checkbox"/>	Name	Total Size	Modified	Added	Actions
<input type="checkbox"/>	 <b>** Owner Uploaded Files **</b>	105 KB	Nov 5, 2020	Jan 23, 2020	
<input type="checkbox"/>	 Buildertrend Training (Global)	0 KB	May 1, 2019	May 1, 2019	⋮
<input type="checkbox"/>	 Excel (Global)	2 MB	Jan 5, 2022	Oct 17, 2019	⋮


**Videos / Drone Videos** ☰ ☰

Files Sort Sort By ⌵ ⬆


Select All



Slider.mp4 ⋮  
**NEW**



Overhead.mp4 ⋮  
**VIEWED** Nov 20, 2020, 7:07 PM



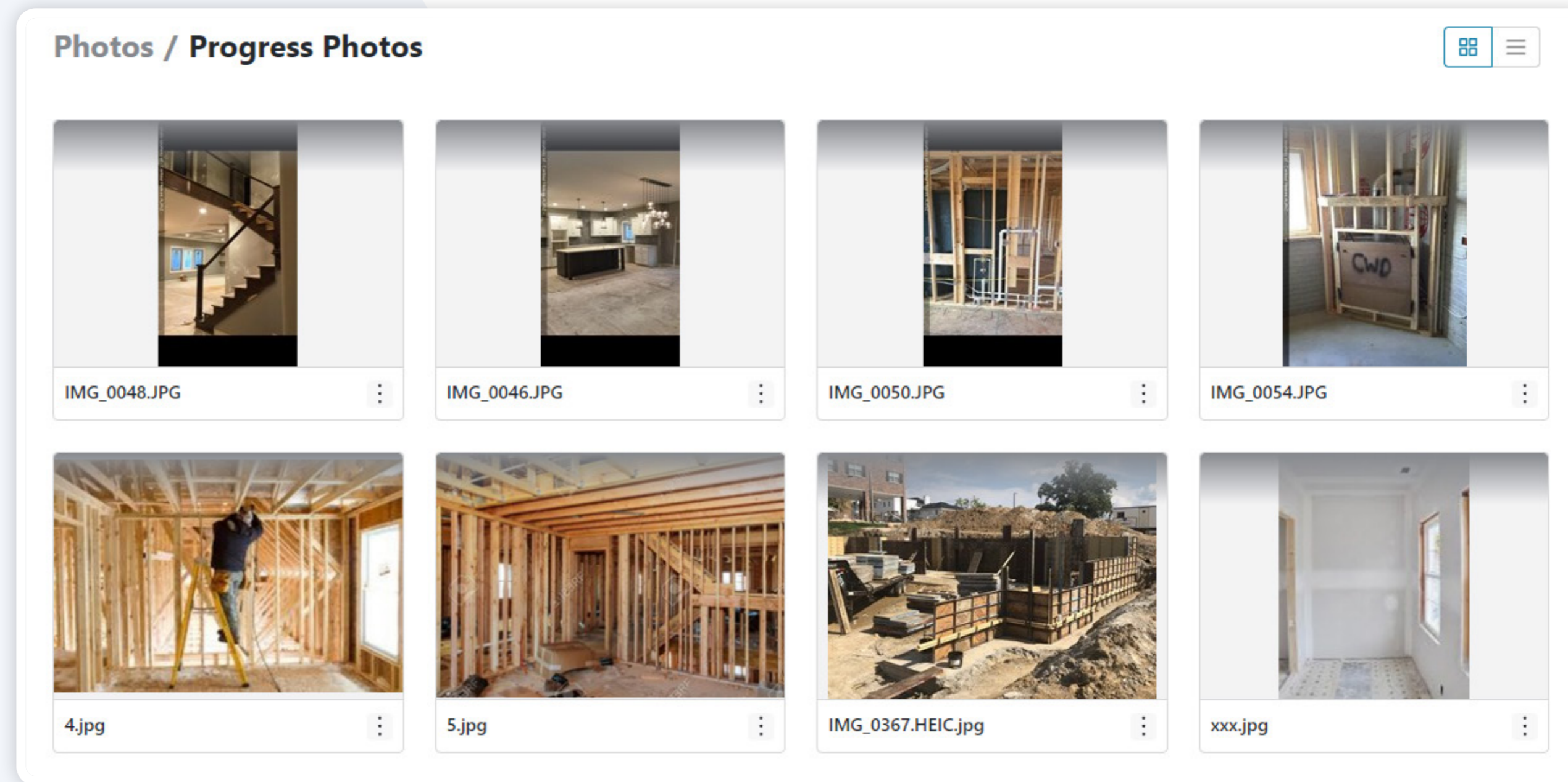
Descent.mp4 ⋮  
**NEW**



# Photos

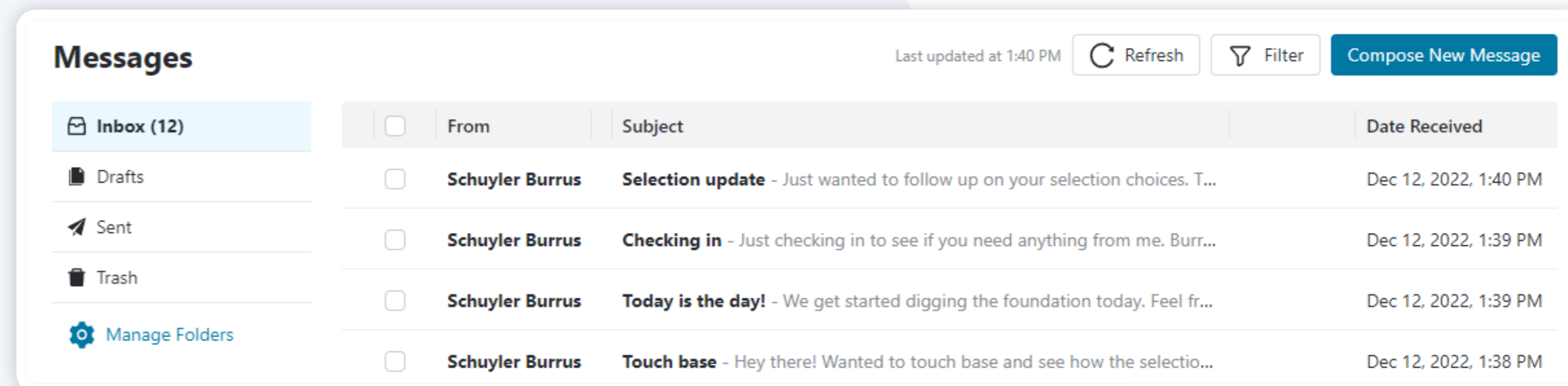
The photos feature will be a place of reference where you can see what's going on with the job. You can easily click into folders and view photos, as well as add your own photos to the appropriate folder using the same workflow as uploading documents.

If you'd like to share any of the photos of your project on social media, open the photo and use the social media links in the top left-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 individual you're wanting to send it to. You can send a message to an external party by clicking the **Plus** icon next to the **To:** dropdown.



# Commenting

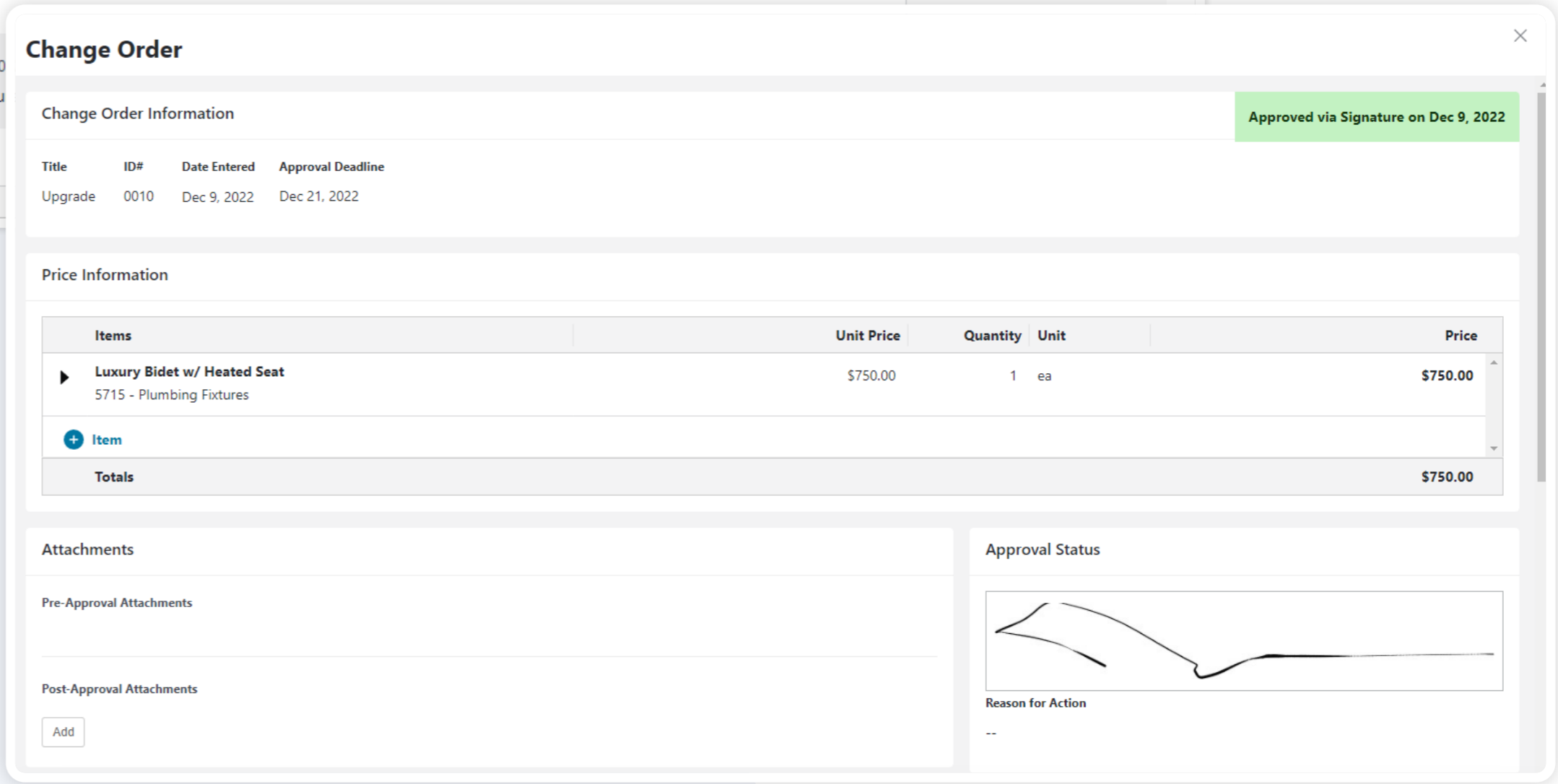
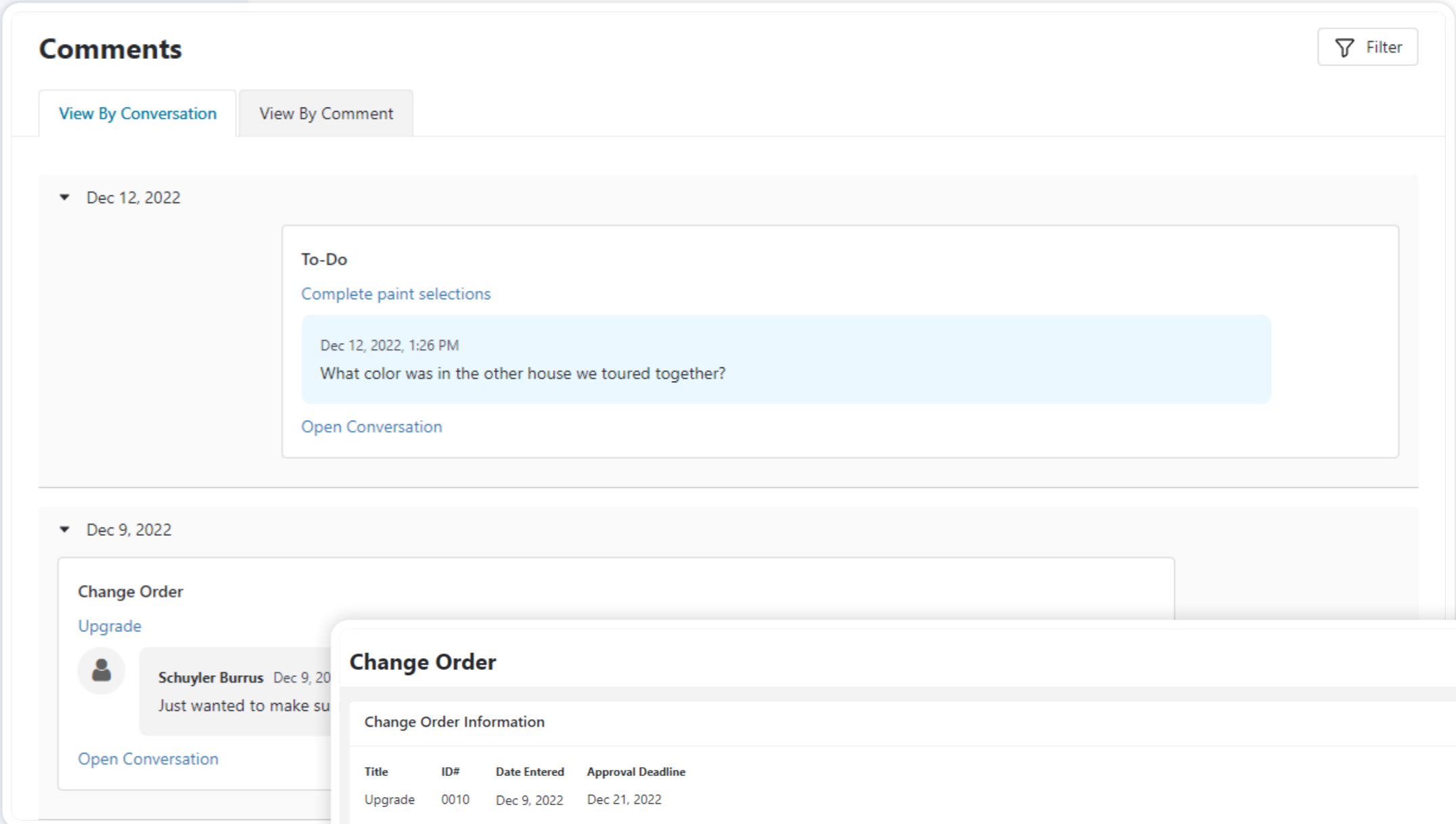
In the comments tab, you can view any of the comments on your project items without having to find the specific item the discussion originated within. You can reply back to comments by using the + button in the top left-hand corner of a comment. If you need to review the item before commenting, you can 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'll 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 one shows 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.

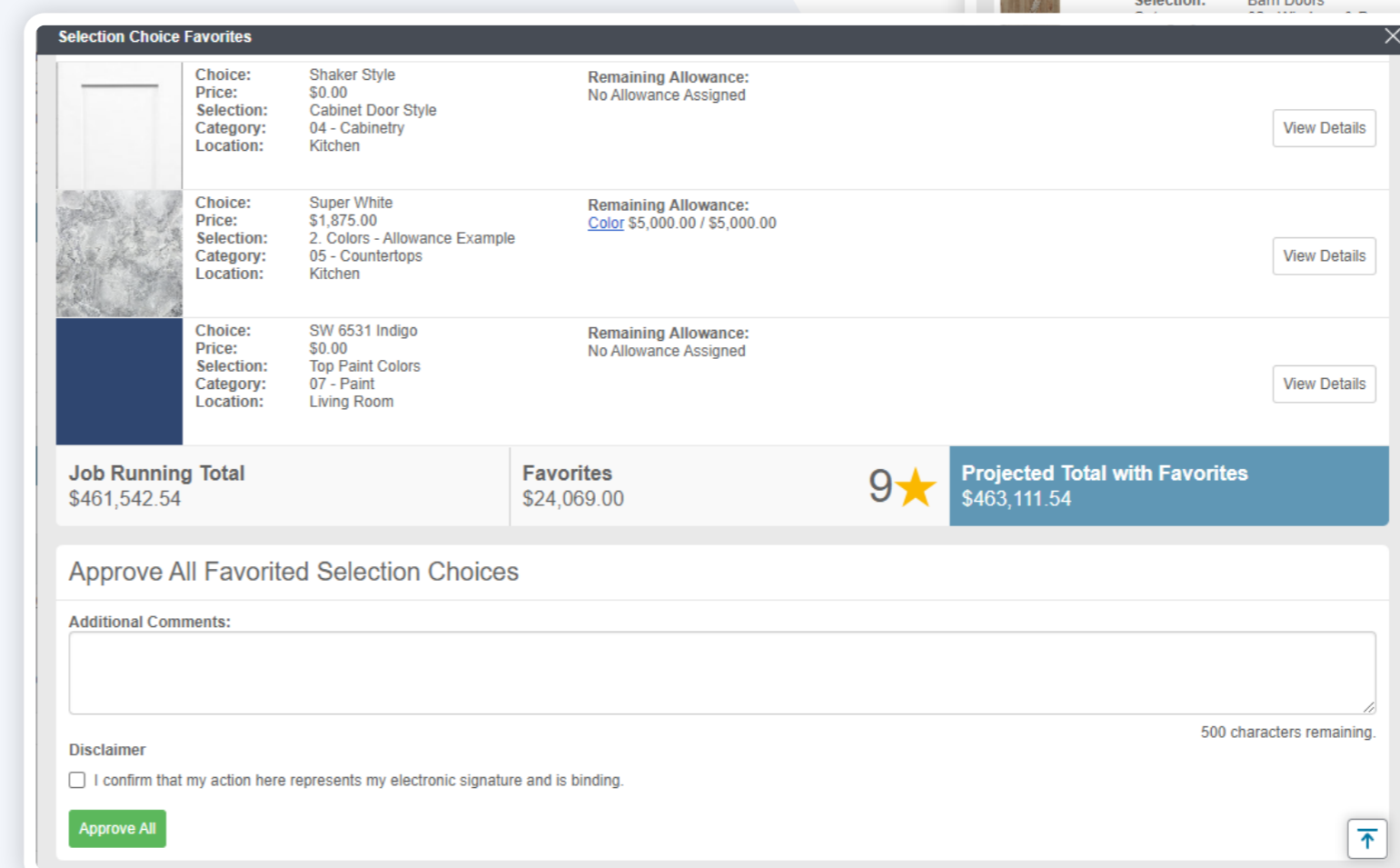
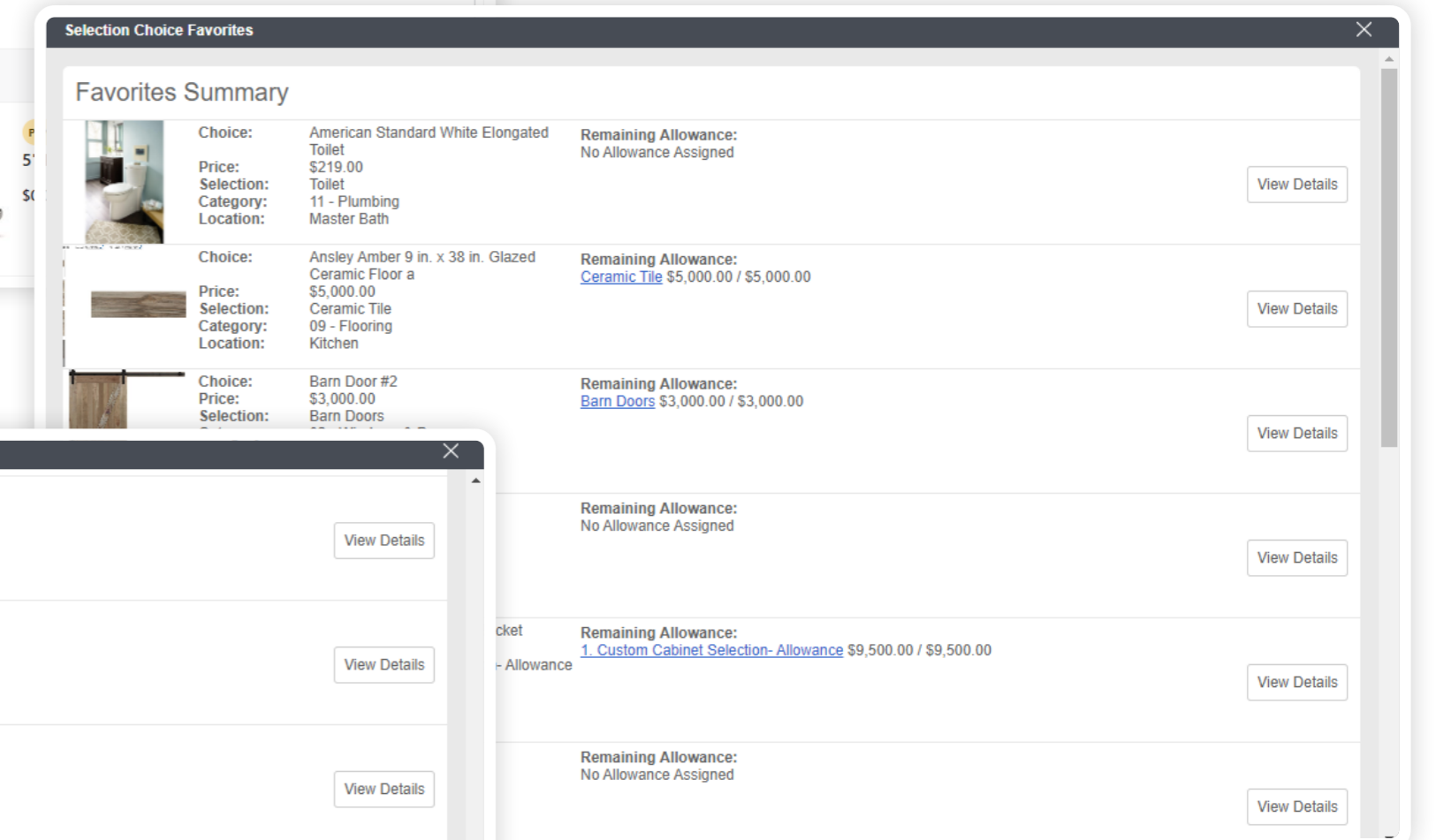
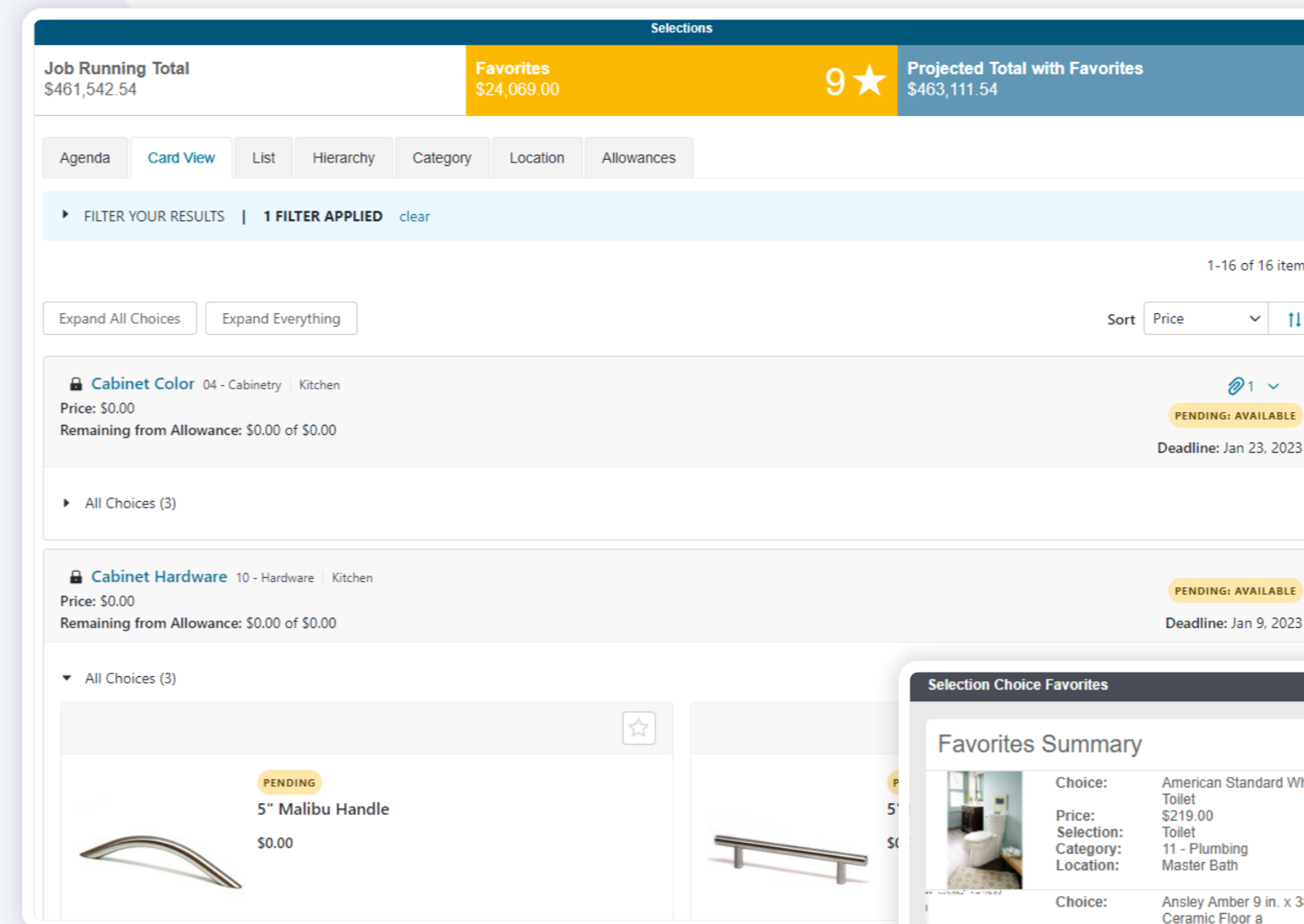
In order to approve a choice that hasn't been favorited, you can either click on the choice title or the checkmark available within the overall view of all selections. This will open the choice details where you can review all information before checking the disclaimer and confirming your approval.

## 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.



# 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'll 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.

Survey Details

Print

### Customer Survey - Rated

 **Contour Homes**  
11718 Nicholas St., Omaha,  
NE 68154

Please take a moment to complete the following survey to help us evaluate our performance and quality of work. Add any additional comments or suggestions that you feel would be beneficial for us to know so we may better improve our services. Thank you for your time and have a great day.

Please rate your overall experience with working with us.

Response  
5 ★★★★★

---

Please rate how easy it was to communicate with us when you had questions.

Response  
3 ★★☆☆☆

---

Please rate our ability to keep you informed on the status of your project.

Response  
4.5 ★★★★★

### Warranty Request

Information

Title \*

Category  
Unassigned

Priority  
Low

Description

Attachments

Add

Messaging

Messaging available after save

Save

# 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'll see an option Lizzie on the right-hand side to pay online for any unpaid items.

[Make a Payment](#)

**Owner Invoices**

Invoice amount total    Applied credit memos    Amount paid total    Remaining balance  
 \$212,461.85    - \$8,050.00    - \$149,871.85    = \$54,540.00

[Invoices](#)    [Credit Memos](#)

ID#	Title	Status	Invoice Amount	Amount Paid	Balance	Deadline	
INV-562155	CO - Barn Door Invoice	PAID	\$792.00	\$792.00	\$0.00	Feb 14, 202	
INV-552985	Deposit	PAID	\$10,000.00	\$10,000.00	\$0.00	Jun 25, 202	
INV-552986	Draw 1	PAID	\$7,500.00	\$7,500.00	\$0.00	Feb 10, 202	
INV-552988	Draw 2	PAID	\$500.00	\$500.00	\$0.00	Feb 12, 202	
INV-562161	Additional Appliance	PAID	\$2,250.00	\$2,250.00	\$0.00	Feb 17, 202	
INV-562162	#1	PARTIALLY PAID	\$14,700.00	\$500.00	\$14,200.00	Feb 19, 202	<a href="#">Pay Online</a>
INV-562156	Downpayment	PAID	\$50,000.00	\$50,000.00	\$0.00	Mar 2, 202	
INV-562165	Payment after Plumbi...	PENDING	\$13,000.00	\$0.00	\$13,000.00	Mar 5, 202	<a href="#">Pay Online</a>

1-20 of 22 items    < 1 / 2 >    20 / page

# Budget

Depending on the type of builder you're 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.

**Budget**

Job Running Total    Contract Price  
 \$549,430.90    \$550,000.00  
\$238.88/sqft    \$239.13/sqft

[Collapse All](#)

Code	Estimates	Bills/POs	Time Clock Labor	Builder Variance	Total Bill/PO Cost	Customer Variance	QuickBooks Costs	Total Costs	Pa
▼ 1000 - 1999 Preparation Preliminaries									
1000 - Dumpster	\$10,000.00	\$2,000.00	\$0.00	\$0.00 (0.0%)	\$2,000.00	\$0.00	\$0.00	\$2,000.00	\$0.
1001 - Design Selection Fees	\$500.00	\$500.00	\$0.00	\$0.00 (0.0%)	\$500.00	\$0.00	\$0.00	\$500.00	\$0.
1010 - Building permits	\$0.00	\$2,650.00	\$0.00	\$500.00 (18.9%)	\$3,150.00	\$0.00	\$550.00	\$3,700.00	\$800.
1110 - Blueprints	\$0.00	\$250.00	\$679.17	\$0.00 (0.0%)	\$250.00	\$0.00	\$0.00	\$929.17	\$679.
1130 - Deliver Dumpster	\$0.00	\$2,000.00	\$0.00	\$0.00 (0.0%)	\$2,000.00	\$0.00	\$0.00	\$2,000.00	\$0.
1300 - Demolition	\$265.00	\$615.00	\$136.68	\$0.00 (0.0%)	\$615.00	\$0.00	\$0.00	\$751.68	\$136.
▼ 2000 - 2999 Excavation and Foundation									
2010 - Plumbing—ground	\$8,000.00	\$19,000.00	\$0.00	\$0.00 (0.0%)	\$19,000.00	\$0.00	\$0.00	\$19,000.00	\$5,000.
2110 - Concrete	\$0.00	\$600.00	\$0.00	\$0.00 (0.0%)	\$600.00	\$0.00	\$0.00	\$600.00	\$600.
2200 - Waterproofing	\$0.00	\$1,250.00	\$0.00	\$0.00 (0.0%)	\$1,250.00	\$0.00	\$0.00	\$1,250.00	\$0.



# 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 set up 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 concerns about your Buildertrend account, please reach out to our Customer Support team at 1-888-415-7149 or support@buildertrend.com. You can also click on the Live Chat tab within your account for automated help or to speak with a support representative.

