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BuilderTrend Owner Manual

A guide to using BuilderTrend

BuilderTrend Owner Manual

Introduction:

Welcome to Buildertrend! This is the software we use to manage (almost) every aspect of your project, and we want you involved!

You will receive an email invitation to Buildertrend. The link will lead you to the site where you will create a login. Buildertrend is free to use as an Owner, and we think you will find it quite useful.

Selections:

Selections are where we will manage all our allowances, decision deadlines and finish details. These selections will have broken out by the following categories: Cabinets, Doors/Hardware, Lighting Fixtures, Plumbing Fixtures, Glass/Hardware, Interior Trim, Paint, Roofing, Pavers/Patio, Stone, Vanity, Tile/Grout, Windows, Various Casework, and any other job specific category. Each category will have an associated deadline based on the standard lead times to help ensure we have all materials on site for installation. These deadlines are linked to the scheduled install calendar item.

The selections tab will also allow you to view and track allowances. Once a final selection has been made and the final cost has been calculated, it will be applied to the allowance. The difference in cost will be shown in client contract.

Change orders:

The change order tab is where you can request, approve, and decline change orders. A log of all change orders will be kept under this tab. You will be able to view the effect of change orders on the project cost.

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Viewing schedule:

The Schedule will be broken down by categories/tasks within the scope of the project. You will be able to view the project schedule under the schedule tab in Buildertrend. As the project changes, there will be adjustments to the schedule so that it is always up to date. Within the schedule you will be able to see Daily Logs, Selections Choice deadlines, and To-Do Items. During the preconstruction period, the Project Manager will manage the schedule. During the construction period the Superintendent will manage the schedule.

Daily logs:

Daily Logs is where you will be able to keep track of the daily work that is happening on the project. For each workday there will be a summary and pictures of the work that was completed or begun.

Invoicing:

Invoices will be created in Buildertrend but sent out for payment through QuickBooks via email. You will receive a notification from BT whenever a new invoice is ready and due for payment. After that, be sure to look for the QuickBooks invoice in your email – it may take up to one day. Payment can be made directly online by following the prompts on the invoice; or you may hand-deliver a check to your Project Manager at any time.

Once your payment is made; it will automatically update in the job running total in Buildertrend. At any point during your project, you will be able to see invoices that were paid to date and your remaining balance including change orders and adjustments to allowances on selections.