

+ How to pay your bill in Buildertrend

Important tip: We recommend using Google Chrome or Mozilla Firefox for optimal performance.

Step 1

Add a payment method by clicking on the settings wheel in your account, then selecting Add a new payment method.

***Not compatible with Internet Explorer.**

Owner Setup

Edit

Login Information Change Username Change Password Change Guest Password

Primary Account Owner

Username
buildertrendpayments@gmail.com

Guest Access

Share your account with friends and family by setting up a guest password. The people you share with will not have access to your project's financial information.

Guest Username
buildertrendpayments@gmail.com

Payment Methods Add Payment Method

No payment methods

Make paying for your project easy by adding an online payment method.

Step 2

After selecting either Pay online here or the Payments tab, you'll see all scheduled payments, draws and both paid and outstanding change orders. You'll also see the option to Pay online for any unpaid balances.

Processing occurs after an e-check or card has been entered by clicking Pay online. You'll also see Paid and Pending which means the payment is either processing or outstanding according to the deadline.

Owner Invoices List

Make a Payment

☒ Credit Card
Select Credit Card
Use New Credit Card

☐ ACH

☐ Save payment method for future use

Please select which invoices to pay and specify payment amounts.

<input type="checkbox"/>	ID#	Title	Balance Due	Deadline	Payment Amount
<input type="checkbox"/>	0001	Deposit Invoice - Required to Confirm Schedule	\$1,080.00	Dec 2, 2022	\$ 0.00
<input type="checkbox"/>	0002	Materials Invoice - Needed to Start Work	\$7,560.00	Dec 7, 2022	\$ 0.00
<input type="checkbox"/>	0003	Upgrade Shingles	\$2,880.00		\$ 0.00

Pay Online

Step 3

After clicking the Pay online button, the option to choose Credit card or Check will appear. You can also choose to pay with an existing payment method. Once the payment method has been chosen, click Next.

Note: Your builder may have limits on the amounts able to be paid with either method. Don't be surprised if you only have the option to pay using ACH/e-check on larger amounts.



Make a Payment

Payment Amount: \$7,560.00

Pay with Credit Card

Pay with E-Check

Step 4

Skip to step 5 if paying with an ACH/e-check.

If you've chosen to use your credit card, input your card information as shown, then click Next. You'll need to verify your email address to receive a receipt for your card transaction. Then click Confirm.

Approve Buildertrend

Pay with credit card

Name on card

Name

Country

United States

Card number

Card number

Zip code

Zip

Expiration date

MM / YY

Security code



CVV

Next

Step 5

When paying via ACH/e-check, you'll need to type in your bank name and hit Search.

Approve Buildertrend

Pay with credit card

Name on card

Name

Country

United States

Card number

Card number

Zip code

Zip

Expiration date

MM / YY

Security code



CVV

Next

Step 6

This step is crucial for finalizing your payment. There are two ways to verify your account.

Option 1: Log into your bank account if you have a partnering bank.

Note: This feature is only available for select banks. Your account will be verified instantly if this option is available to you. If you don't see this option, your bank doesn't participate in this feature, and you'll need to use the next option.

Option 2: Manually enter your account details. This option requires you to verify your account via micro-deposits. The deposits may take 1-2 business days to hit your selected account. At this time, you'll receive an email with a link to verify the amounts sent to your bank. Once you're able to view the deposits in your account, click the link in the email to enter the micro-deposit amounts.

Next, verify all the information is correct, then click Next to submit your payment.

Option 1

Option 1 shows the process of logging into a bank account via WePay. It consists of three screens: 1. A confirmation screen stating "Buildertrend uses Plaid to link your bank" with "Secure" and "Private" checkboxes. 2. A "Select your bank" screen with logos for Chase, Bank of America, Wells Fargo, Citi, US Bank, Capital One, PNC, and USAA. 3. A "Enter your credentials" screen for Chase with fields for User ID and Password, and a Submit button.

Option 2

Option 2 shows the process of manually entering account details. It consists of two screens: 1. An "Enter bank information" screen with fields for Full name, Email address, Bank name, Routing number, Account number, and Confirm account number. 2. A confirmation screen stating "Your bank info has been submitted" and "We will make two small deposits into your bank account in 1-2 business days."

Step 7

After choosing Confirm to submit your payment, you'll be given the option to Save a payment method for future use and assign a unique name. The system will automatically populate this field with "e-check" or "Card 1", so feel free to rename the account. By taking this step, you won't have to verify future payments using this payment type. And you're done!

Step 7 shows the final confirmation screen. It features a green checkmark, the text "Your payment has been sent", a checkbox for "Save payment method for future use", and an "Ok" button.



Quick tip: To manage your saved payment methods, navigate to your account settings after logging into Buildertrend. You can add, edit and manage all your payment methods here.