BUILDERTREND

TRADE PARTNER HELP DOCUMENT

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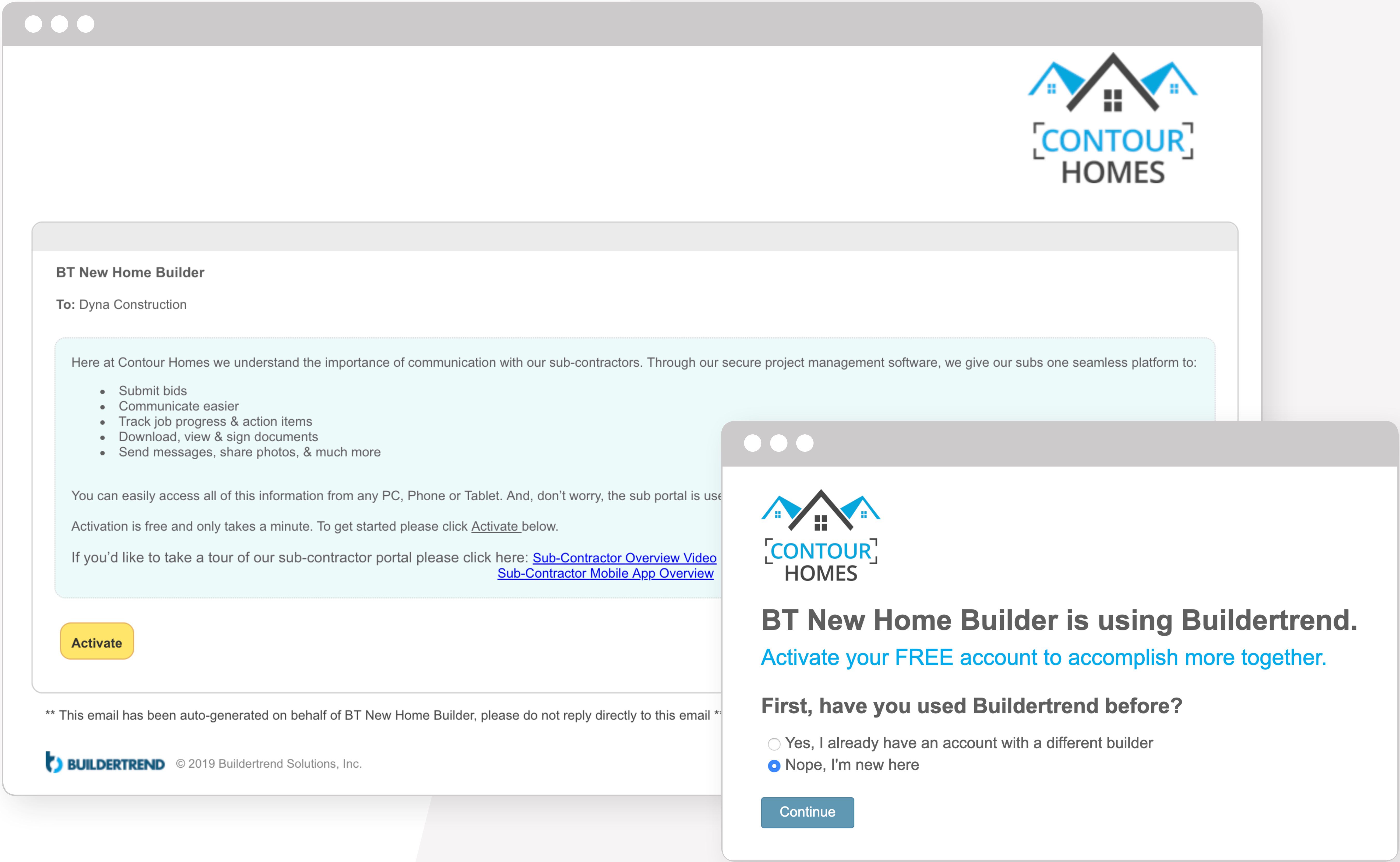
Please keep in mind that your contractor may not be utilizing all of the options listed below, but this document will highlight all possibilities.

HOW TO ACTIVATE YOUR ACCOUNT

When a contractor invites you to Buildertrend, you will receive an email to activate your free Buildertrend account. In order to activate your account, you'll need to click on the "Activate" button within the email.

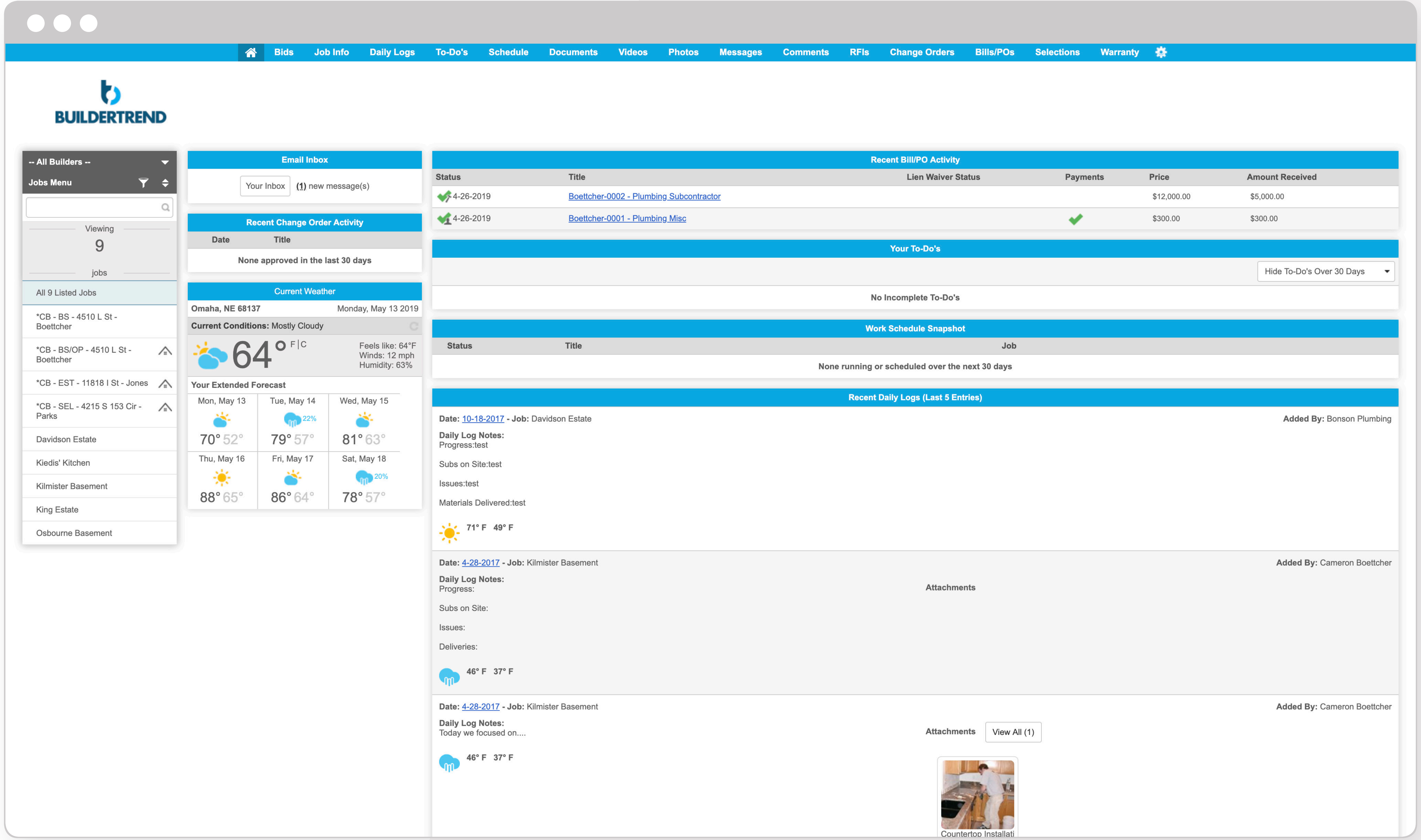
If you already have an account with another contractor, you can select the "Yes" option and log in with your existing credentials. This allows you to link all of your contractors using Buildertrend under one set of login credentials.

If this is your first time using Buildertrend, you will select the "No" option and then create a username and password. Once you create your credentials, you can login to Buildertrend at buildertrend.net. You can also go into the App Store or Google Play Store and search Buildertrend and download the mobile app. You will log you into the mobile app and full site using the credentials you create.



SUMMARY

Your initial Summary screen is designed to give you a quick snapshot of what's happening on jobs that you have access to. You can view any Purchase Orders that need action right on your Summary screen, reference your inbox, Change Orders, as well as your To-Do's, etc. On the left-hand side of the page is where you'll be able to see each of the jobs that you are assigned to. If you would like to view details regarding a specific job, you can click the job to view information related to that job specifically. You'll always have the ability to use the "All Listed Jobs" option to view a Summary of all jobs.



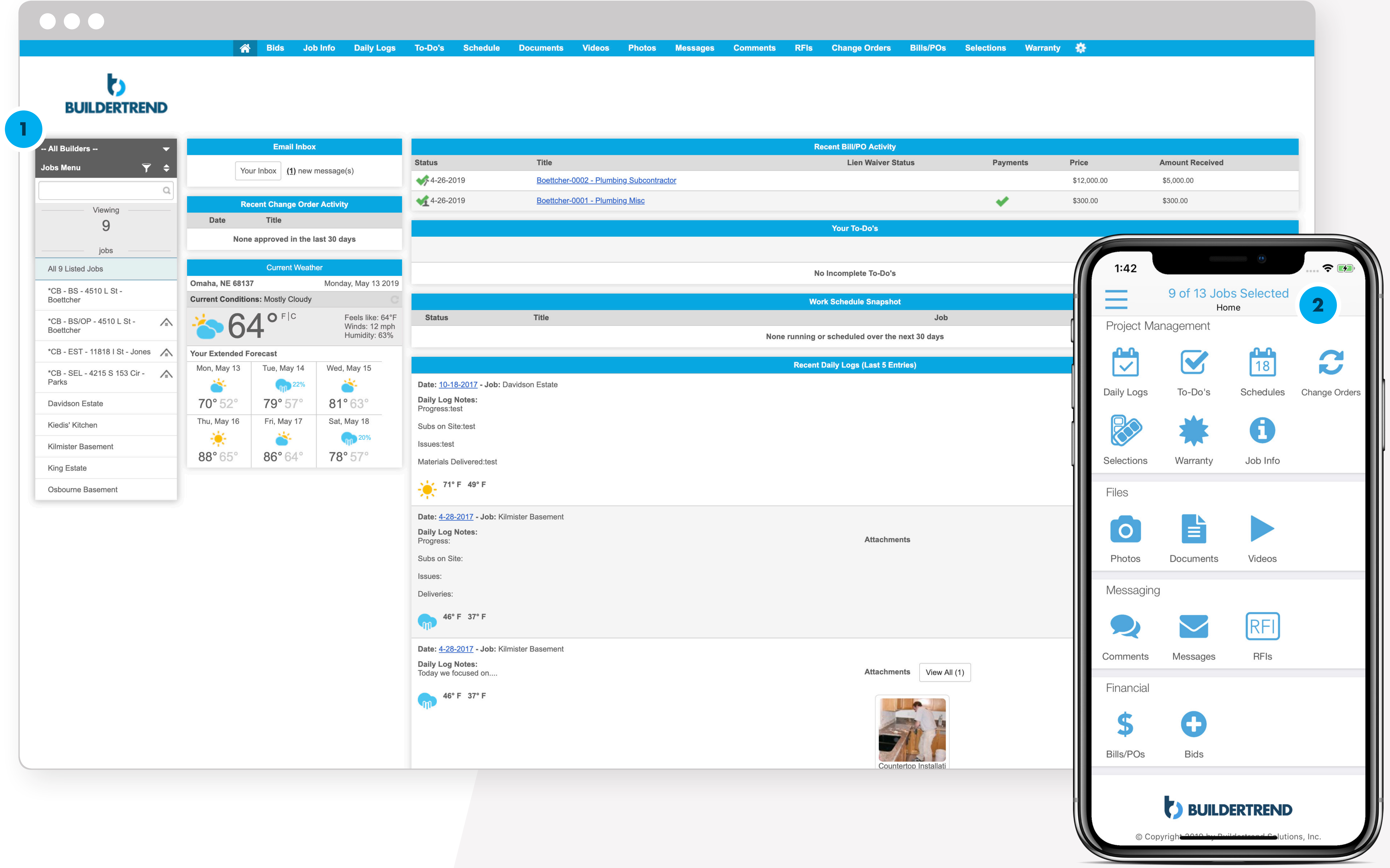
NAVIGATING BUILDERTREND

1 PC

Viewing information within Buildertrend can either be job specific or viewed across all jobs depending on the tab. On a PC, if you would like to view information specific to a job, you would first select the job from the left-hand side, then choose any of the options along the banner at the top to view information related to specific features.

2 Phone or Tablet

When accessing Buildertrend on a phone or tablet, tap "Select a Job" at the top of the mobile app to display a list of jobs you have been assigned to. You have the option to select a specific job by tapping on the job. You can view all jobs by tapping on the "All Listed" option at the bottom of the screen.



BIDS

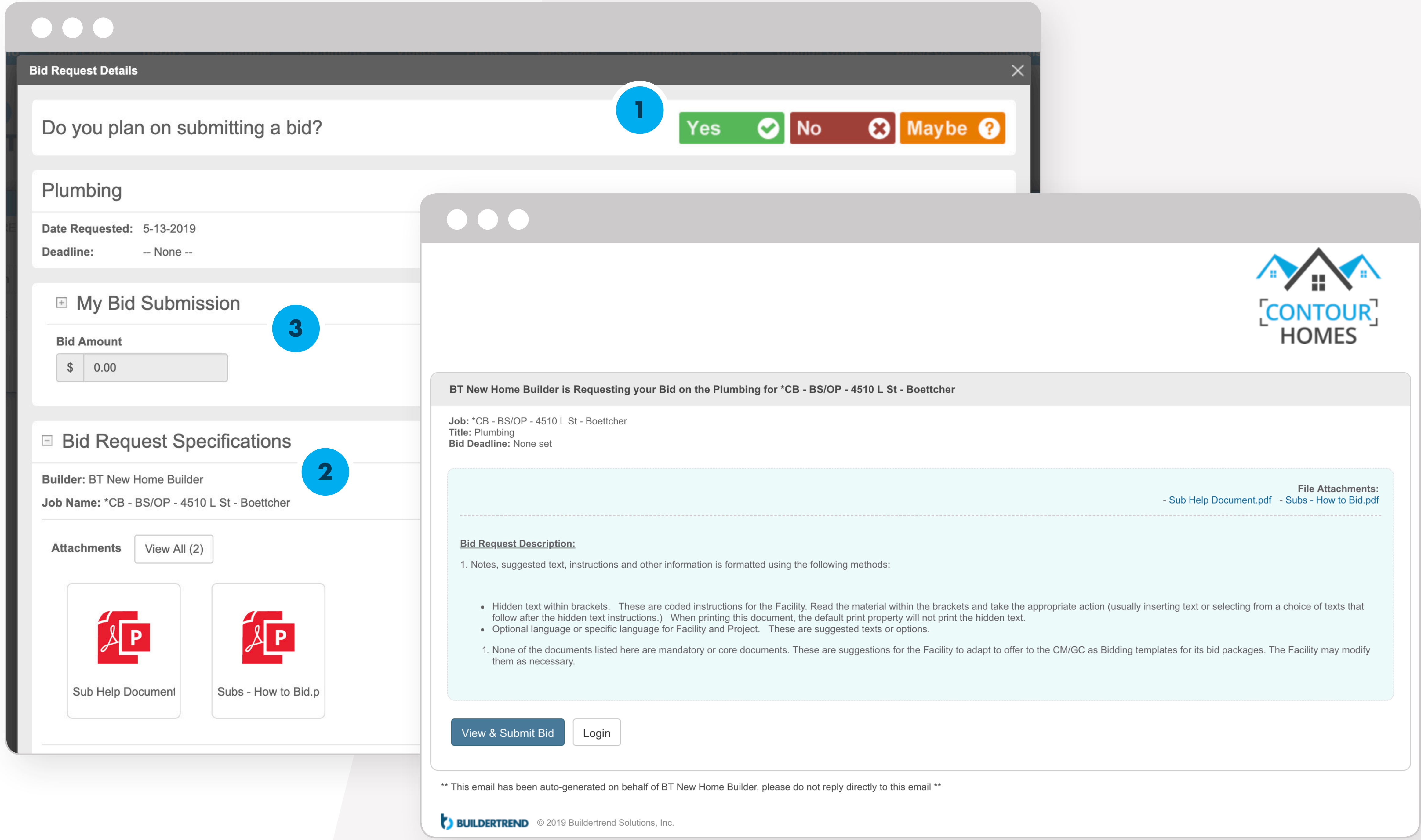
1 The Bids tab will show the bid packages that the builder wants you to bid on. Once you receive a Bid Request, you first need to decide if you are going to submit a bid or not.

After informing the builder of your decision, you can begin entering in your bid information. You can do this directly from your email as well, giving you the flexibility and power to manage your Bids inside and outside of the program.

2 You will have the ability to review any details or files attached within the bid package at the bottom of the page. There is also a messaging option that can be used to comment on the bid package or submit an RFI (Request for Information). A comment is a one-to-one discussion between yourself and that particular contractor. You will be notified via email, text and/or push notification when the contractor replies to any comments. The RFI option will be used if there is information that is necessary to complete the bid package.

3 Once you have reviewed the information and are ready to input your bid information, you can do so within the "My Bid Submission" area. If your contractor has decided to use Cost Codes, you'll be able to view and reply with pricing specific to each cost code. You will also have an option to attach any files related to your Bid, as well as add any additional comments within the Bid Details area.

4 Once your builder receives your Bid, they will select the winning bid(s). You will be notified if you won the bid or not. You are able to toggle through the open, won, lost tabs, as well as view all of your Bid Packages.



JOB INFO

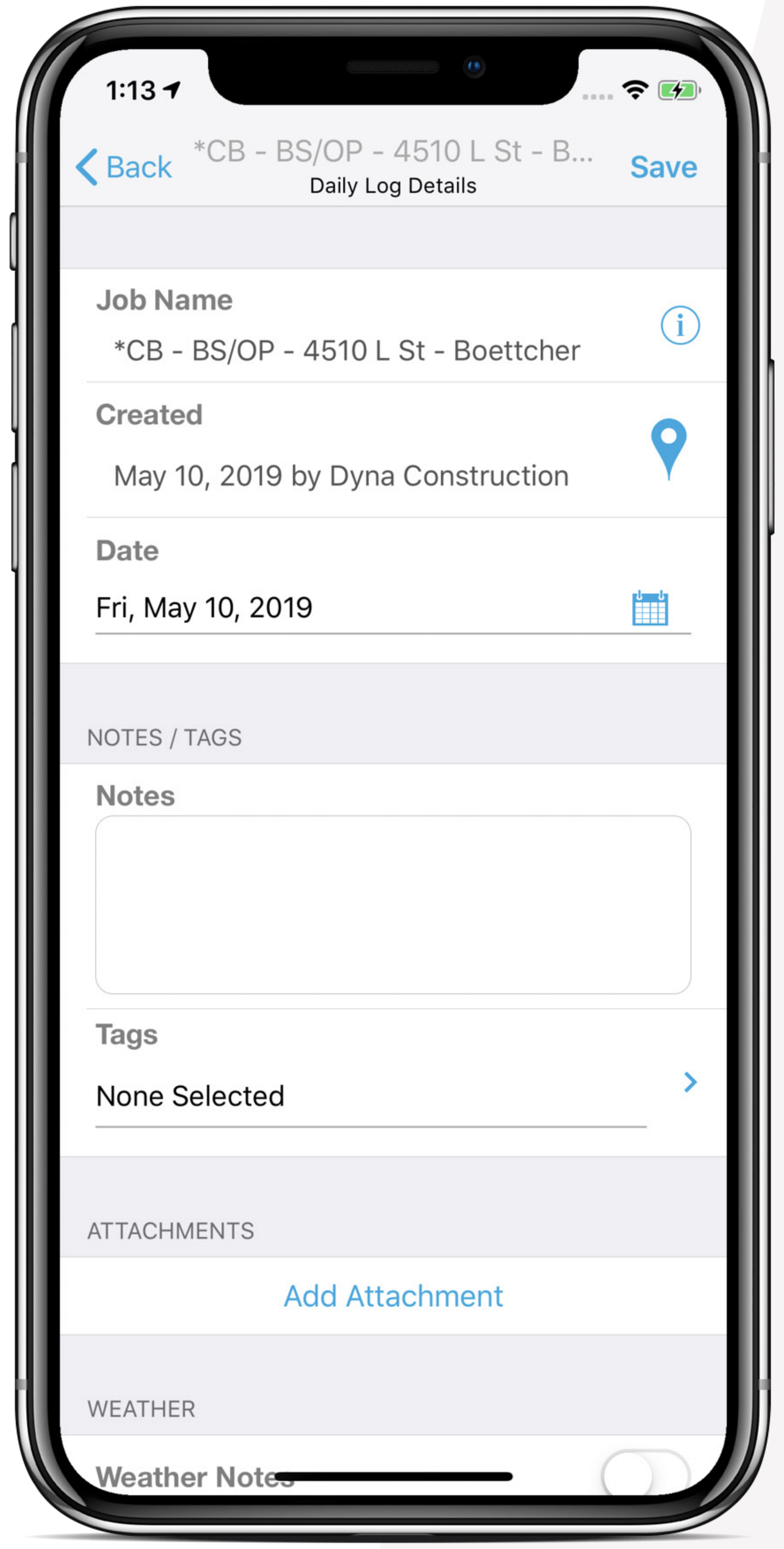
This tab provides basic information related to the Job. This includes information regarding the project managers, lot number, address, permit number, as well as any additional notes about the Job.

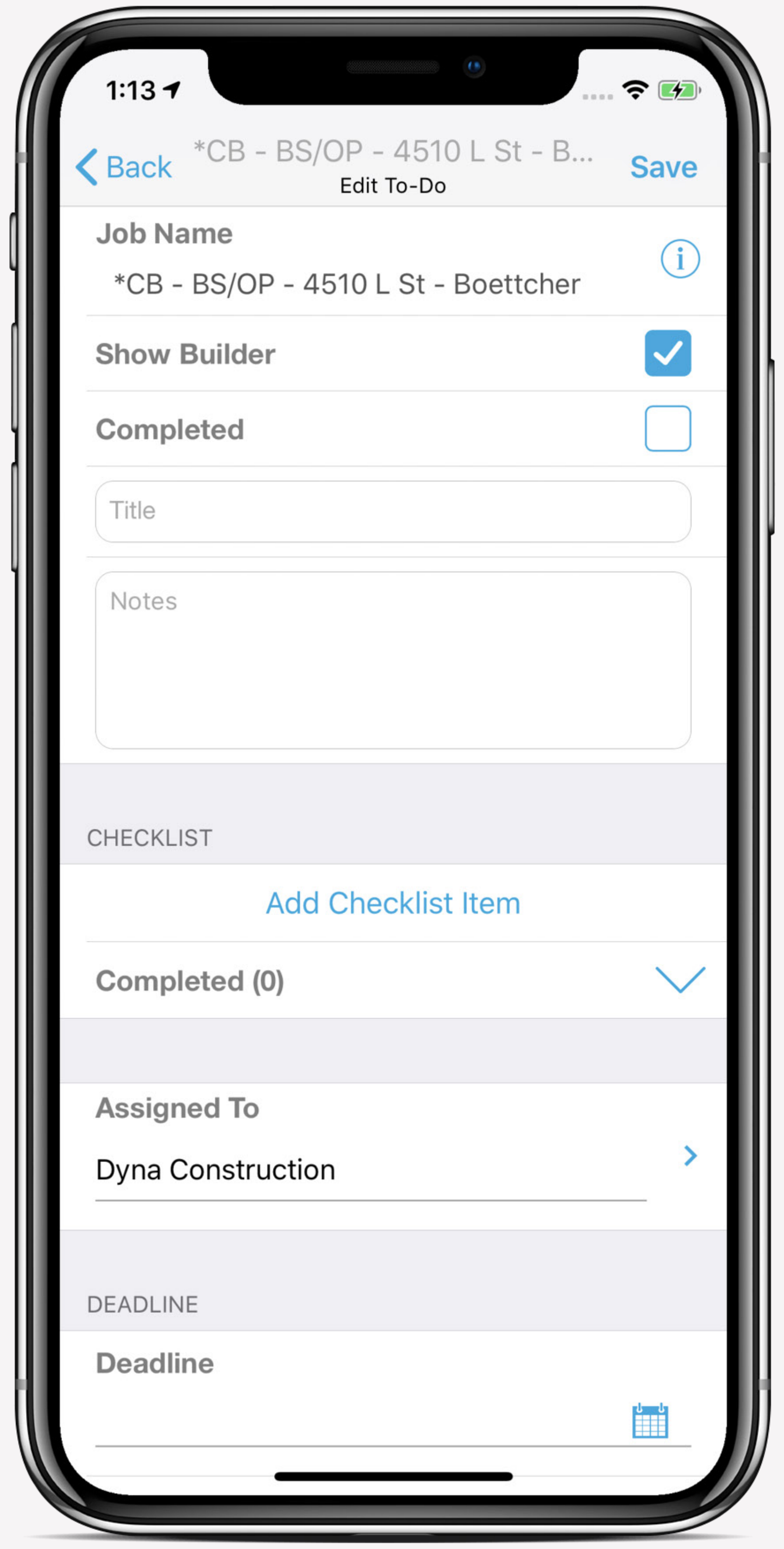
DAILY LOGS

This tab will display any Daily Logs that the builder has created for the job. These are quick notes that can keep everyone on the same page. You can create Daily Logs by using the "New Daily Log" button on a PC or the plus icon in the top right-hand corner of the mobile app when in your Daily Logs feature. Daily Logs are only shared with the contractor.

TO-DO'S

This tab can be used to create To-Do's for you to complete. These can be different tasks that arise during the job that provide a reminder in order to remain on schedule. The builder can assign To-Do's to you. You will receive a notification when assigned to a To-Do. You can check items off the list as you complete them. Once finished, you can mark the entire To-Do as complete, by clicking or tapping the checkbox at the top. This will notify the builder that the To-Do has been completed.



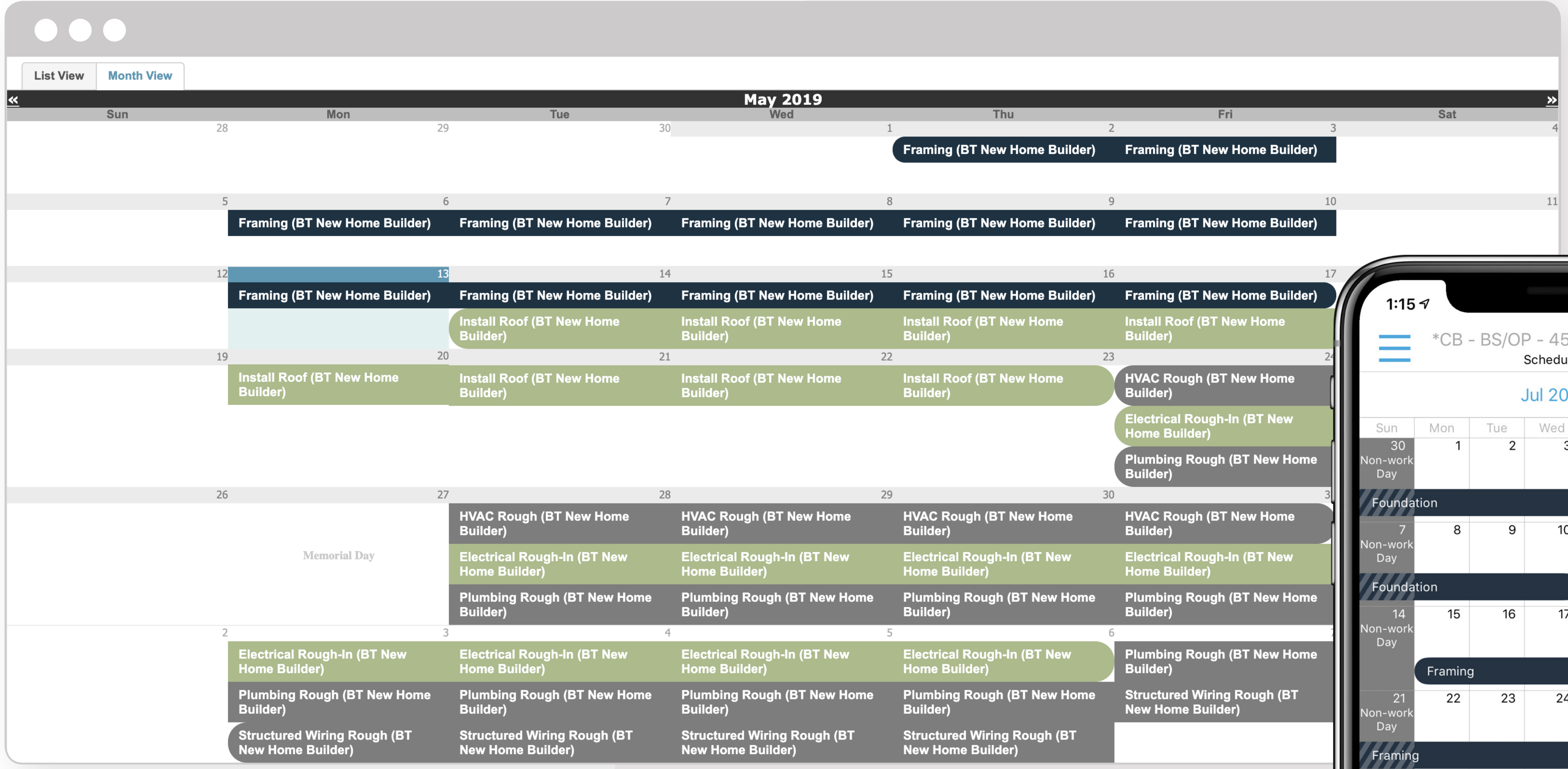


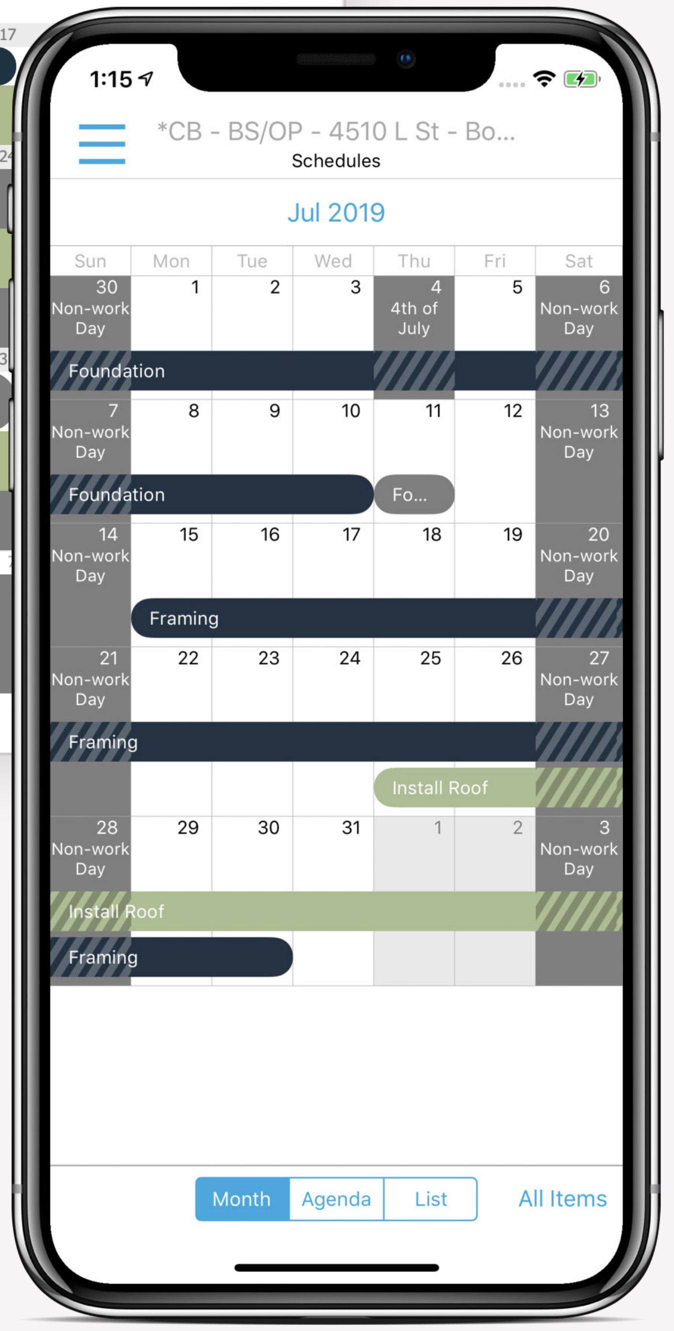
SCHEDULE

The Schedule can be viewed for all or individual jobs by making your selection on the left-hand side of the menu. You have the option to view only Schedule items where you are the performing sub or view current items only, as well as printing the Schedule if you need a hard copy.

The list-view shows all scheduled items. Your Schedule items will be highlighted in green. You can check the “Show Only My Schedule” at the top, under “Filter Your Results”, in order to view the items assigned to you. Once an item has been assigned to you, the builder can request your confirmation on the date and time of the item. Simply click on the confirmation link and select “Accept” or “Decline.”

The Schedule view displays one month at a time. You can move month-to-month by clicking on the arrows located to the left and right of the current month you are on. The same filters are available to show only your schedule on the month view, as well.

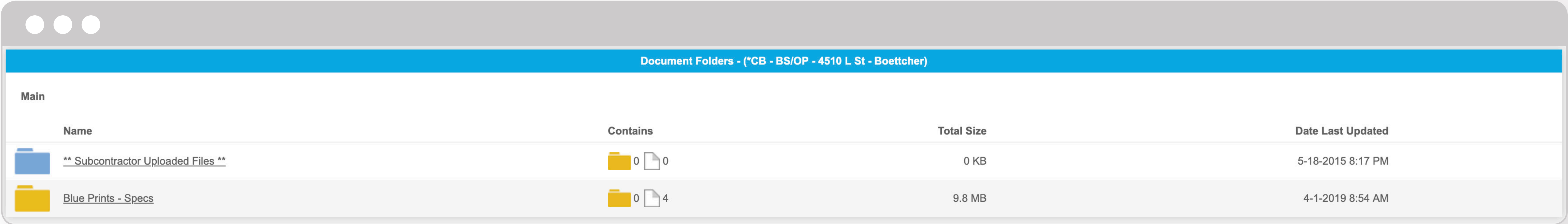




DOCUMENTS

The Documents tab will let you view and download any documents the contractor shares with you. The contractor can upload their blueprints and specs, which means you will always have access to these important documents. The Documents tab is job specific. In order to view documents for a job, you will need to select the job on the left-hand side when accessing the Documents tab.

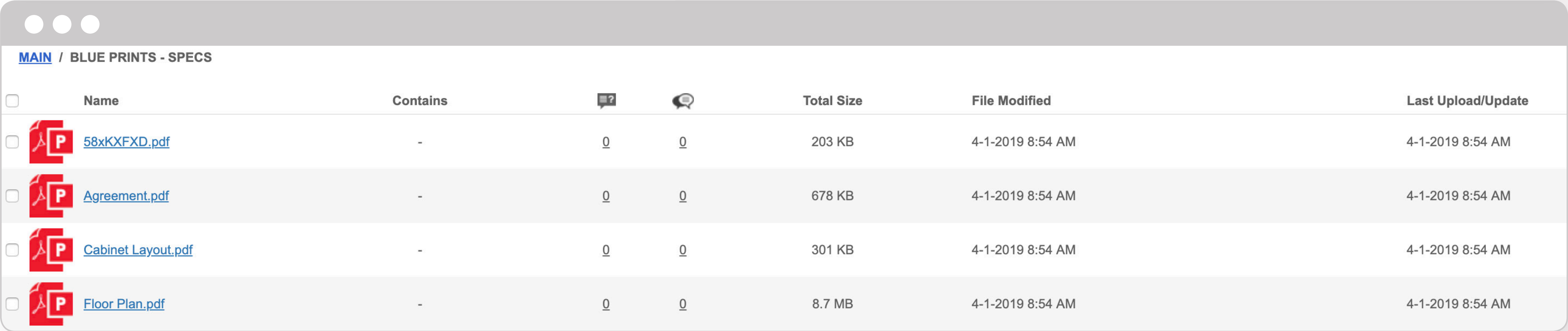
You will also see an option for "Subcontractor Uploaded Files." If you need to add any documents to share with your contractor, you can do so after clicking on this folder. Once you click on this option, you will have the option to add any documents.



Document Folders - (*CB - BS/OP - 4510 L St - Boettcher)

Main

Name	Contains	Total Size	Date Last Updated
** Subcontractor Uploaded Files **	0 0	0 KB	5-18-2015 8:17 PM
Blue Prints - Specs	0 4	9.8 MB	4-1-2019 8:54 AM

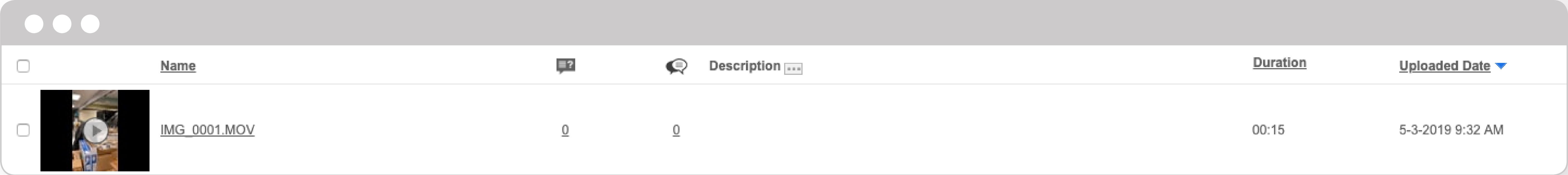


MAIN / BLUE PRINTS - SPECS

Name	Contains			Total Size	File Modified	Last Upload/Update
58xKXFXD.pdf	-	0	0	203 KB	4-1-2019 8:54 AM	4-1-2019 8:54 AM
Agreement.pdf	-	0	0	678 KB	4-1-2019 8:54 AM	4-1-2019 8:54 AM
Cabinet Layout.pdf	-	0	0	301 KB	4-1-2019 8:54 AM	4-1-2019 8:54 AM
Floor Plan.pdf	-	0	0	8.7 MB	4-1-2019 8:54 AM	4-1-2019 8:54 AM

VIDEOS

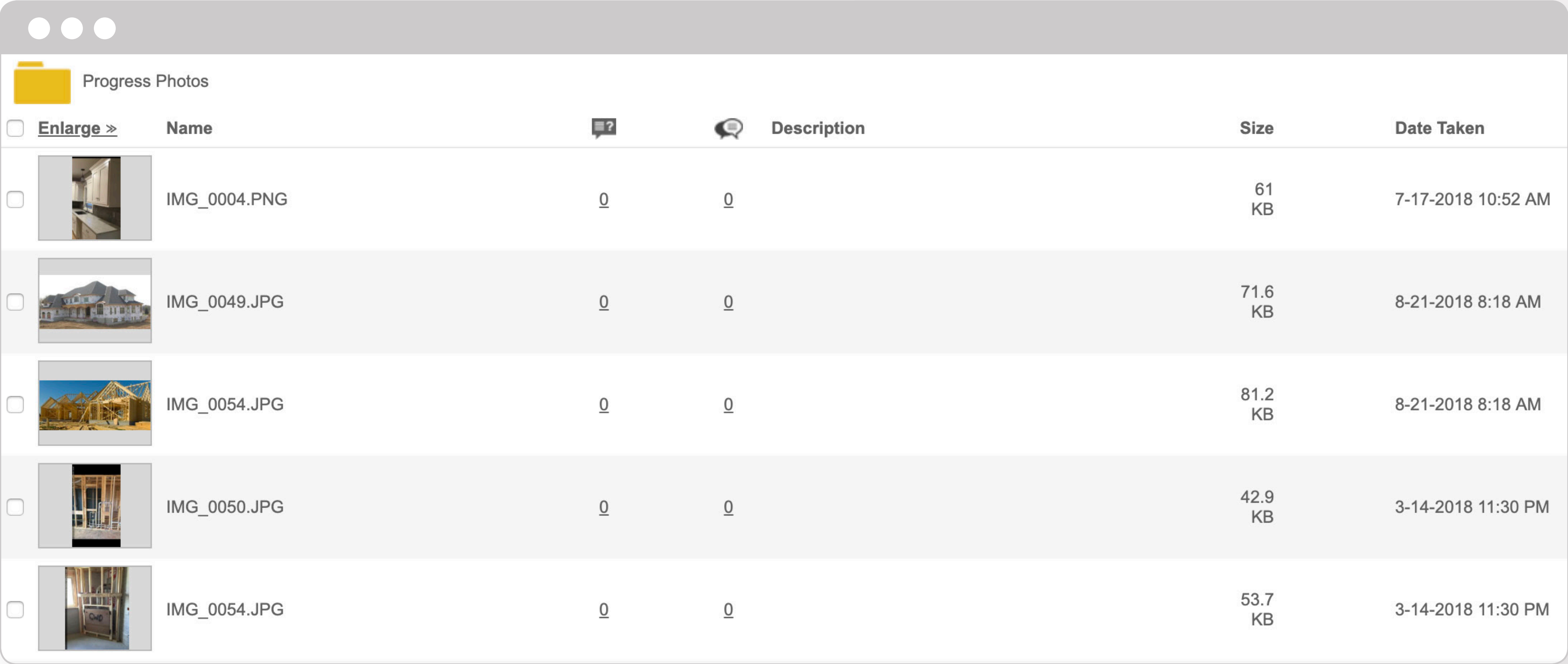
The Videos tab is where you are able to view any videos that the contractor has uploaded for you.



Name			Description	Duration	Uploaded Date
IMG_0001.MOV	0	0		00:15	5-3-2019 9:32 AM

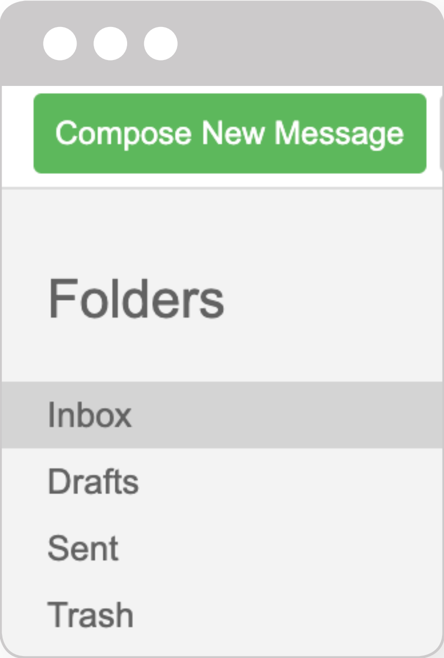
PHOTOS

The Photos tab will let you view any photos the contractor has uploaded into Buildertrend. You can download these pictures to keep for your records, as well. Each contractor has an option to allow you to upload photos into certain folders. Any folder that you are able to upload photos to, you will see a button to “Add Photos” on a PC and “+” button in the top right of the mobile app to add photos.



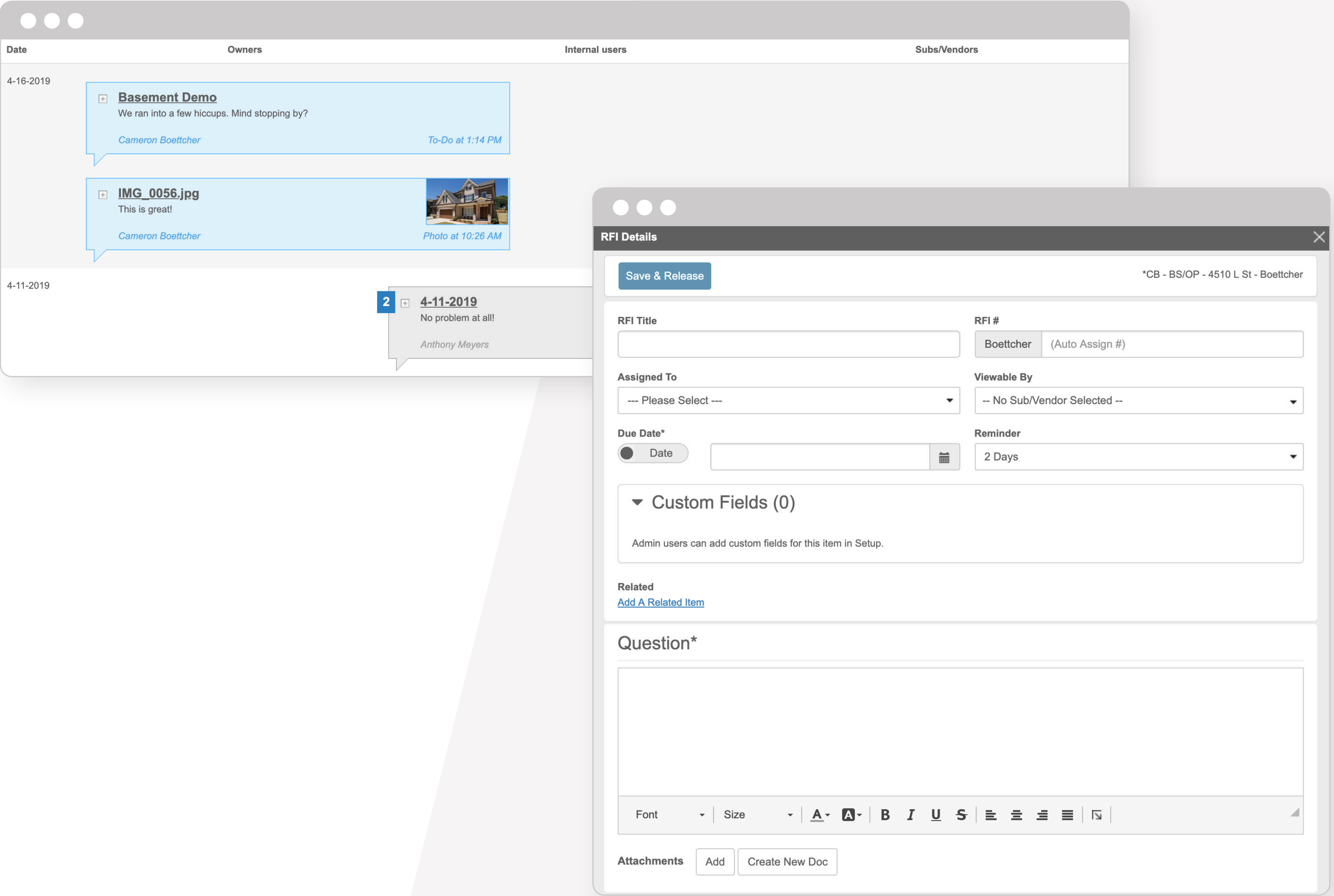
MESSAGES

The Messages tab is another way you can communicate with your contractor through Buildertrend. These messages will be specific to each job and are similar to any email dashboard. To send a Message, click on the “Compose a New Message” icon. You will then select who you want to send the Message to, enter a subject and add your text. Once you are ready to send the Message, click the send icon. You can read and reply to any messages that are sent to you, as well. This feature helps keep all communication in Buildertrend for historical record.



COMMENTS

The Comments tab is where you can view all comments that have been made within Buildertrend. Comments are available within each feature and allow you to communicate easily through the platform, keeping all correspondence logged for historical purposes. The Comments tab in particular is useful for viewing comments without having to go to the specific item that was commented on. Comments can be accessed job by job or while viewing all jobs.

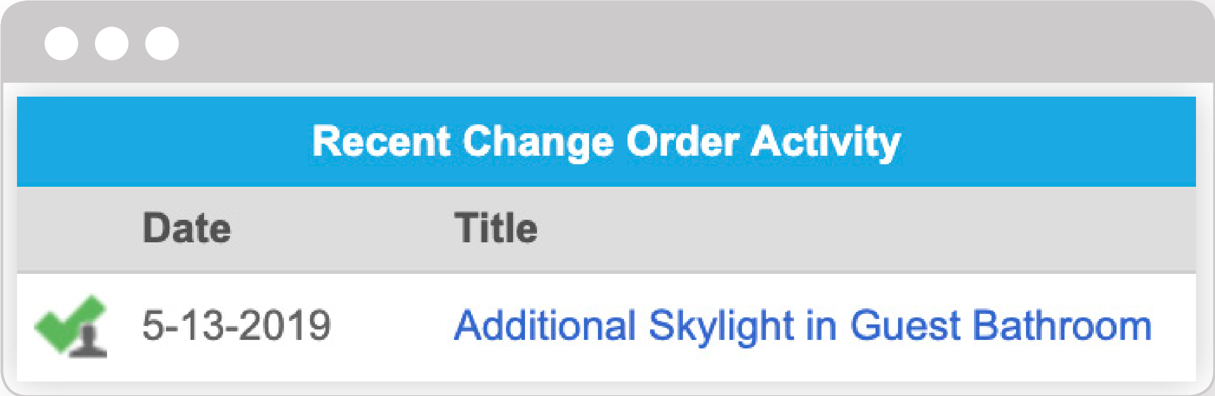


RFIs

The RFI (Request for Information) section within Buildertrend is a point of reference for any RFIs on jobs that you have access to. If you have a request for your contractor, you can create new RFIs and assign them to the contractor. RFIs may be assigned to you, as well. In this case, you are able to fill out any required information and submit your response to your contractor.

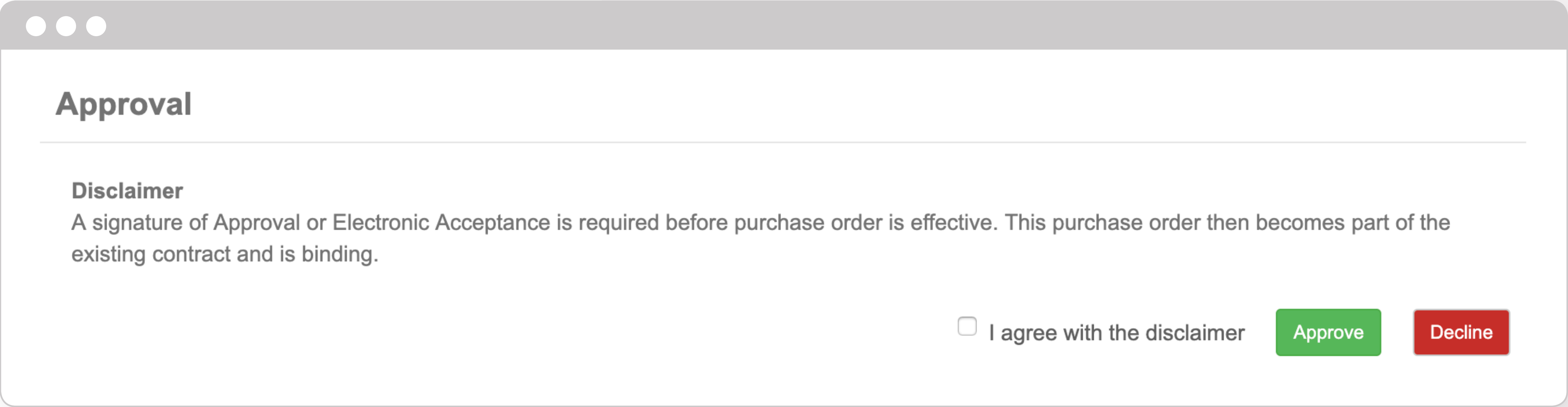
CHANGE ORDERS

The Change Orders tab grants access to view any Change Orders that have been approved the homeowner that are associated with you. You can view any attached documents, notes and the full description of the Change Order.



BILLS/POS

The Bills/POs tab is where you can view all Purchase Order information for POs that have been assigned to you. Within the PO you will be able to review all pricing and scope information. If there are any questions that arise, you have the ability to comment or create an RFI for the PO. At the bottom of the purchase order details, you will find the ability to approve or decline the Purchase Order. You will first need to click the disclaimer checkbox before approval.



You can approve Purchase Orders directly from your email or you can log in to Buildertrend.

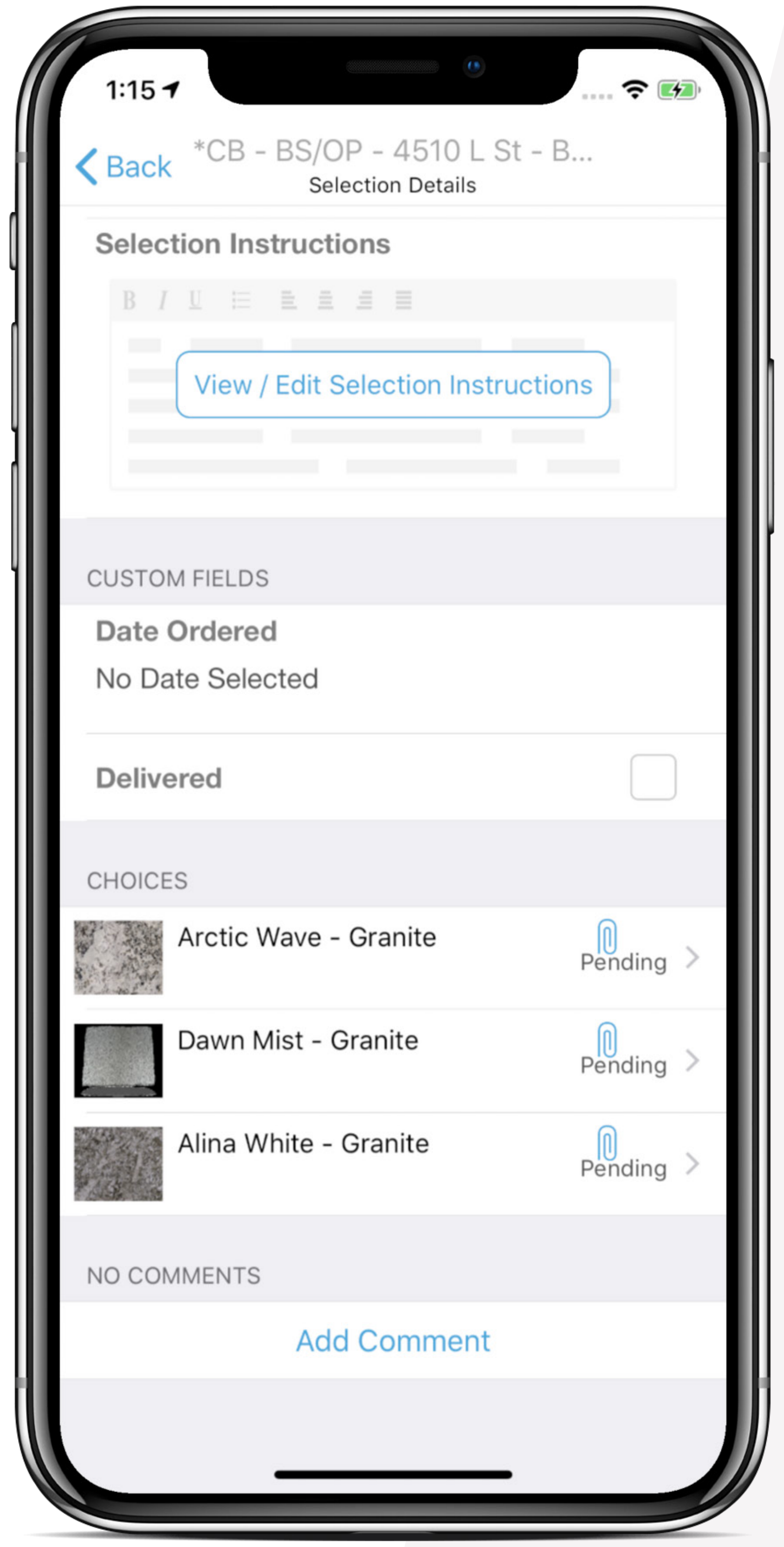
If you approve the Purchase Order, the next step would be letting you builder know when your work is complete. This can be done by clicking the request payment icon at the bottom of the purchase order details screen, accessed by clicking on the Purchase Order. This will notify the contractor that you are requesting payment for your work.

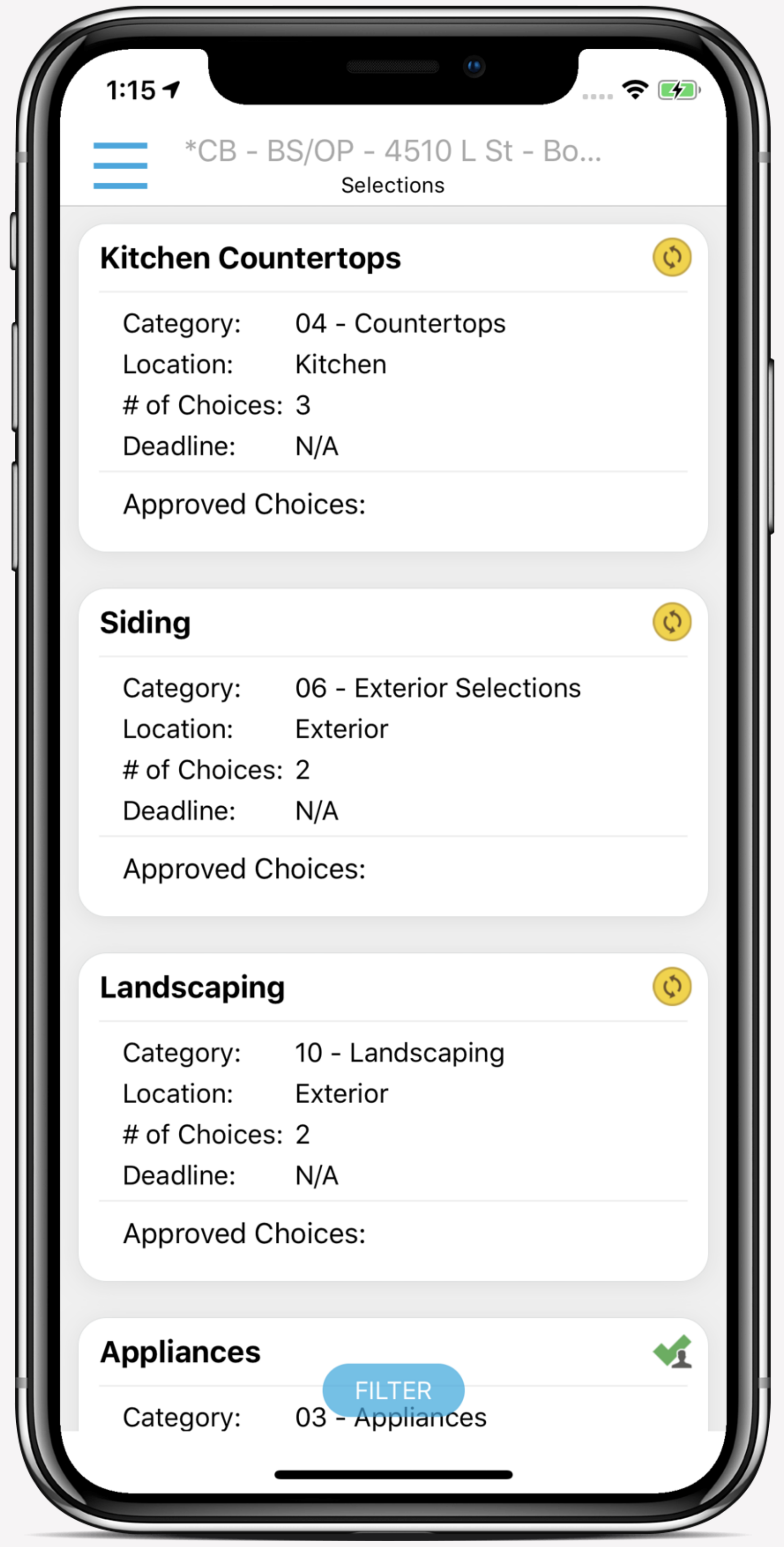
Once your work has been verified by the contractor, they can start making payments. The payment information will show the amount paid for each PO.

SELECTIONS

Clicking on the Selections tab will give you access to view any selections that require your involvement. By clicking on the title of the Selection, you can view the choices for that Selection. You can add comments using the comments button. You may be able to add files or choices for this selection, as well.

Clicking on the title of the choice will allow you to see additional details pertaining to the choice. You may be able to add pricing information, upload files and photos, as well as add additional information.





WARRANTY

Clicking on the Warranty tab will give you access to all Warranty Claims requiring your involvement. There are two different ways a service appointment can be scheduled. Your contractor may schedule a day and time, then submit it to you. They may allow you to schedule the appointment manually, providing notes of homeowner availability. To accept or schedule the appointment, click on the “Accept Appointment” or “Set Appointment” link. Either approve or decline the date and time, or set your date and time. Once you and the homeowner approve the appointment, the system will consider it scheduled. If you decline the appointment time you can request a new day and time.

SETUP

The Setup tab is where you can adjust your profile. You can update your username and password, the company name, contact, address, as well as any phone numbers. Within the Setup tab, it will also show if you have a general liability and/or workman’s comp certificate on file with the contractor. From here, you can update the email address and opt in for text message notifications by clicking on the “cell email” field. To save any changes, click the save setup icon at the bottom of the page.