Buildertrend Manual for Owners

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About

Buildertrend is a construction management software designed to increase collaboration and transparency between the general contractor, subcontractors, and owners. We have carefully selected this program and hope that you will use Buildertrend to its fullest extent to ensure your project is executed as smoothly as possible.

Support

For questions about the program feel free to contact our office and ask for April Yennior.

(800) 234-0800 or april@deshano.com

You may also contact Buildertrend directly for questions related to the software. There is no charge for service calls to Buildertrend. (531) 202-7300 or support@buildertrend.com

Buildertrend Username and Password

You will receive an email invitation from Buildertrend to create an account. You'll be able to set up your account with your own username and password. Should you need assistance please contact our office and ask for April Yennior (800) 234-0800 or april@deshano.com

How to login to Buildertrend

Once you have setup or received your login credentials, you may login by either going to www.buildertrend.net or by downloading the Buildertrend app within the App Store for Apple devices, or the Google Play Store for Android devices. Your username and password are valid for each platform.

Note: You may be presented with the option to place a branded app icon on your mobile devices home screen, it is up to you if you want this added or not. Tapping either the Buildertrend icon, or the DeShano Companies logo will take you to the same place.

Upon logging in, you will be presented with summary page.
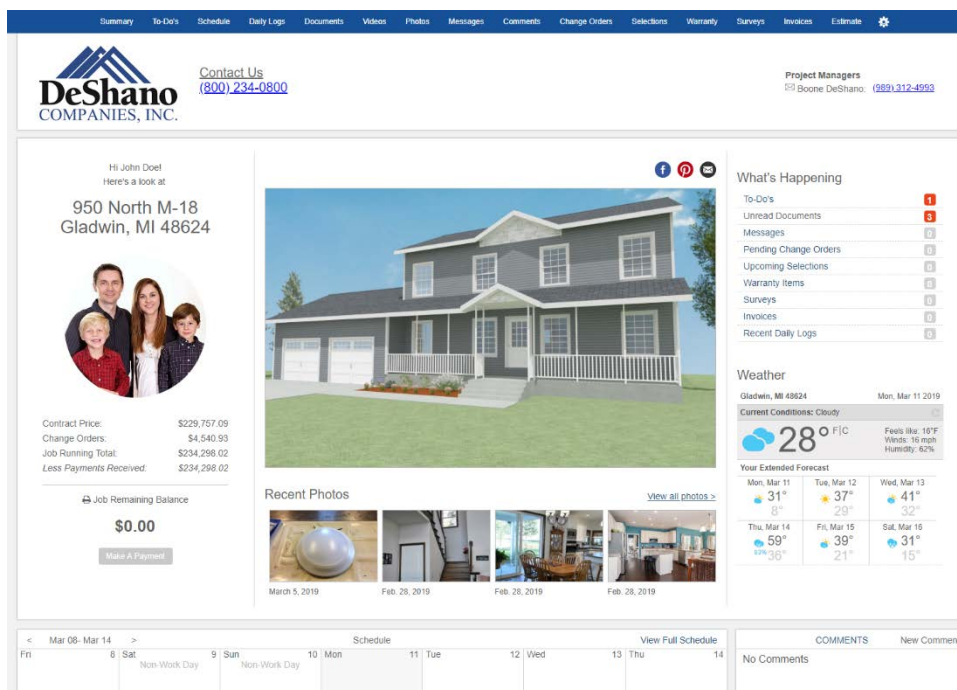
How to Navigate Buildertrend

To view information within Buildertrend, you may either click on the "What's Happening" section to view unread items, or click on any of the tabs in the top banner to view information specific

to that tab. From the mobile app, click on the three bars in the top left-hand corner and choose the information you'd like to view.
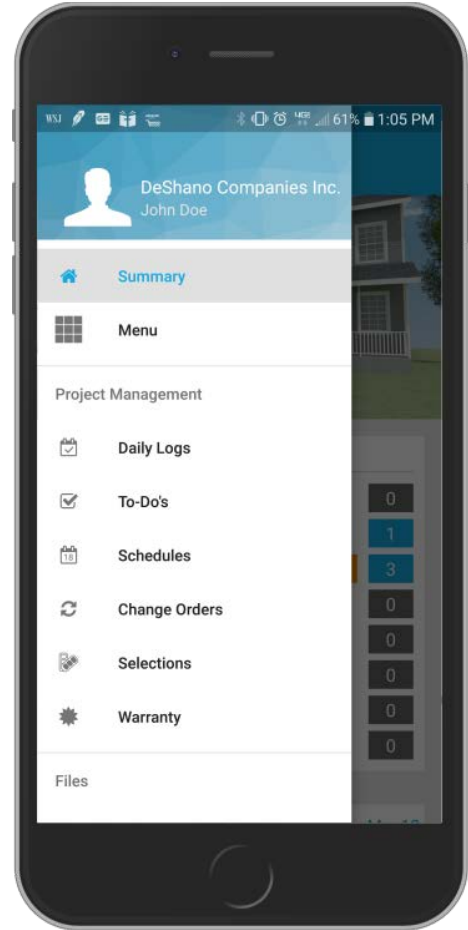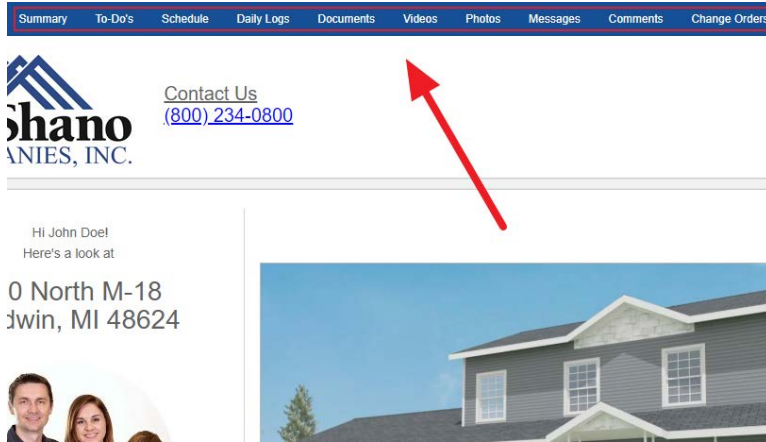
1 - Summary Page

Within the initial summary page, the "What's Happening" section on the right-hand side is designed to give you easy access to new items or items that have not yet been viewed. Use this to keep yourself up to date on all new items related to your project.

The job price summary on the left-hand side of the page is meant to keep you up-to-date on where you are at financially for your project. To view more details, you may click on the "Job Remaining Balance" option and an itemized statement will be viewable.

Hi John Doe!
Here's a look at

950 North M-18
Gladwin, MI 48624

Contract Price: $229,757.09
Change Orders: $4,540.93
Job Running Total: $234,298.02
Less Payments Received: $234,298.02

🖨 Job Remaining Balance

$0.00

Make A Payment

DeShano Companies Inc.
325 Commerce Court
Gladwin, MI 48624
Phone: (800) 234-0800
Fax: (989) 426-0526

Current Address: | **Job Address:** | **Print Date:** 3-11-2019
555 Nowhere Avenue | 950 North M-18
Gladwin, MI 48624 | Gladwin, MI 48624

Owner Info:
John Doe

CONTRACT PRICE SUBTOTAL: $229,757.09

Approved Change Orders

Date	Title	Price
1-28-2019	Change Order 2	($721.00)
2-6-2019	Change Order 1	($58.00)
2-19-2019	Change Order 3	($2,438.00)
2-19-2019	Change Order 4	$1,687.81
2-19-2019	Change Order 5	($1,844.00)
2-19-2019	Change Order 6	$467.00
2-19-2019	Change Order 7	$7,850.10
2-19-2019	Change Order 8	($165.00)
2-19-2019	Change Order	$0.00
2-19-2019	Change Order 10	$950.00
2-19-2019	Change Order 11	($151.74)
2-19-2019	Change Order 12	($950.00)
2-28-2019	Closing Change Order	($86.24)

Approved Change Orders Subtotal: $4,540.93

Payments Received

Date	Title	Amount
	Deposit	$2,000.00
	Draw #1	$32,463.56
	Draw #2	$64,000.00
	Draw #3	$4,943.91
	Draw #4	$48,000.00
	Draw #5	$58,000.00
	Outstanding Contract Balance	$24,890.55

Payments Received Subtotal: $234,298.02

Job Price Summary

Contract Price Subtotal:	$229,757.09
Approved Change Order Subtotal:	$4,540.93
Job Running Total:	**$234,298.02**
Less Payments Received:	$234,298.02
Remaining Balance:	**$0.00**

2 - To-Do's

Within the to-do's tab you will be able to reference any to-do's that have been assigned to you, create new to-dos for yourself, as well as set follow up reminders. 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.

You can create one to-do per item or create a checklist of items so you can individually mark tasks off. All to-do's that have a due date will also populate on the calendar feature for easy viewing access along with other important due dates (change orders, invoices, etc.) for your project.

If you have any questions over a to-do that you have been assigned to you may use the "Add Comment" button to send a notification with your question to DeShano Companies.

3 - Schedule

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

The schedule for your job will not be published until a start date is set, and individual durations are customized for your job. If you don't see the schedule upon first logging in, check back in a few days.

4 - Daily Logs

Daily logs are an easy way to reference quick updates on your project. To view the details of an individual log, simply click on the date which will open the daily log and display any photos that are attached along with an option to comment if you have any questions. We try to complete at least one log per job per week. This allows all stakeholders to stay abreast of the project's status.

5-26-2017

Footings were poured today. Inspection and pour went well.

Covering with concrete blankets overnight.

Hi: 94° F
Lo: 72° F

5-23-2017

Rebar started today for the footings. Great progress. More of the same tomorrow. The footings are scheduled to be poured next Monday.

Hi: 94° F
Lo: 72° F

5-22-2017

Excavation of basement and footings were completed today. Everything went according to plan. We were able to form up the footings and prep for rebar.

Additional photos in the "Progress" album in photos

Hi: 94° F
Lo: 72° F

5-15-2017

Site work kicked off today. The lot is staked and the plumbers have marked their trenches.

Hi: 94° F
Lo: 72° F

Owner Daily Log Details ✕

Daily Log Information

Date: 7-11-17

Notes:
Site work kicked off today. The lot is staked and the plumbers have marked their trenches.

Saturday, June 10 2017

Partly Cloudy   **94° F**
                 72° F

Wind: 26 mph
Humidity: 71%
Total Precip: "

Photos

Files

Attached File(s):

Discussions

Messaging   Add Comment

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5 - Documents

Within the documents tab you will be able to view all of the important documents for your project. If you need to share any documents with your contractor you'll also have an option to upload documents into the "Owner Uploaded Files" folder.

6 - Videos

The videos tab will allow you to view any videos that have been uploaded into Buildertrend and shared with you.

7 - Photos

The photos tab is where you may view any pictures that have been uploaded into Buildertrend. When you click on the folder name you will be able to view all of the photos within that folder. Clicking on individual photos will then expand the photo, and you will be able to share to Facebook, Pinterest, or Twitter, as well as comment directly to the photo for communication with your supervisor. We encourage clients to upload their own photos as well, and are always grateful for complete photos.

8 - Messages

The messages tab in Buildertrend is an email center specific to your project. You'll be able to view and reply to any emails DeShano Companies has sent and also compose messages to any of the employees with viewing access to your project. This doesn't have to replace your current email address if you don't want it to, however it is a great way to keep project specific emails organized in one place, and you will still receive notifications in your normal email inbox. You will also have the option to CC your normal inbox for outgoing emails.
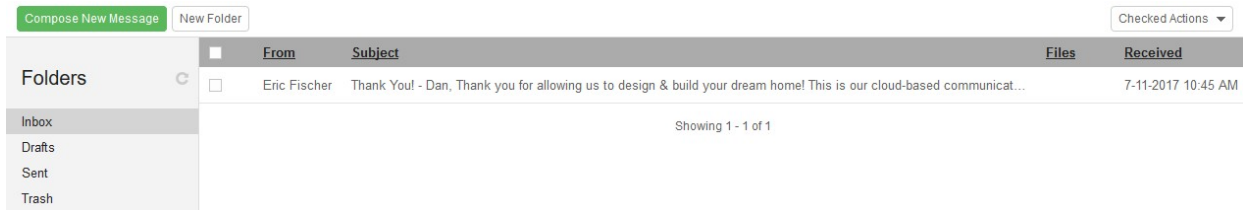
9 - Comments

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. <u>You may reply back to comments by using the "+" button in the top left-hand corner of a comment</u>. If you need to review the item before commenting you may click on the bolded title of the comment which will open the specific item the discussion was originally applied to.
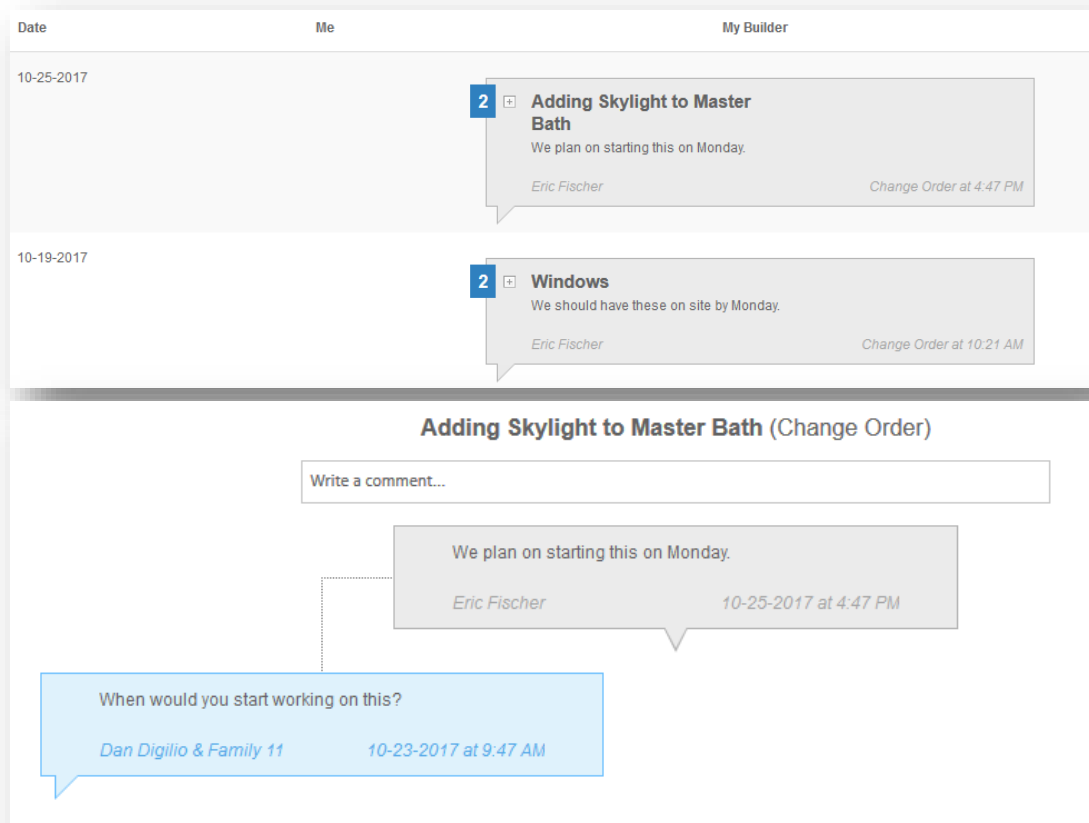
10 - Change Orders

The change orders section within Buildertrend is where you'll be able to reference each of the change orders added to your project. In order to view more details within a change order you may click on the title, this will allow you to review pricing information, deadline dates and any additional details of the change order. You may approve or decline a change order by going to the bottom of the page and checking the disclaimer and then choosing to approve or decline. You will be prompted for a signature to confirm your action. Once a change order has been approved, you can pay it online from the invoices tab.

Open Change Orders

	CO ID#	Title	Approval Deadline	Price	Amount Paid	Payment Deadline	Date Paid	
⟳	1440157	Adding Skylight to Master Bath	Tue, Oct 31	$1,500.00	$0.00			💬 2

Change Order History

	CO ID#	Title	Approval Deadline	Price	Amount Paid	Payment Deadline	Date Paid	
✔	1379904	Windows	Wed, Oct 04	$2,025.00	$0.00			💬 2
✔	1417417	Flooring	Fri, Oct 13	$2,025.00	$0.00	Fri, Oct 20		💬 0
✔	1366571	New Counter tops	n/a	$10,780.00	$0.00			💬 0
✔	1302050	Widen Driveway 6 feet	Wed, Oct 11	$1,260.00	$0.00	Thu, Aug 31		💬 4
			APPROVED:	$16.090.00	$0.00			

Change Order Details

Print   Pending Action as of 10-26-2017

Change Order ID #1447361

Title:	Extra Demo Work for Basement Bar
Date Entered:	10-26-2017
Approval Deadline:	11-1-2017 - 6 day(s) remaining

Line Items:	Quantity	Unit Price	Price
1300 - Demolition Added Demo for Basement Bar	1	$283.50	$283.50

Total Price: $283.50

Amount Paid: $0.00

Payment Deadline:	11-3-2017

Attached File(s): None

Description of Proposed Changes

Dan-
Here is the CO for the additional demo work for adding the basement bar. Let me know if you have any questions. Thanks!

Messaging Add Comment

Reason for Action:

500 Characters Remaining.

Disclaimer: ☐ I confirm that my action here represents my electronic signature and is binding.

Approve ✓   Decline ✗

11 - Selections

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

Key Terms:
- Selection – groups of choices that are organized by category or location.
- Choice – specific item(s) that may be chosen for the project within each selection.
- Upgrade – a choice that is either of higher quality or has additional features that is not included in your bid. Feel free to request pricing for any of our upgrade items.

While working through your selections you have an option to favorite choices before approving by using the star icon. This will allow you to approve multiple choices at one time without having to sign for each approved selection.

Selection Choice Favorites ✕

Favorites Summary

	Choice:	Oak Saddle Solid Hardwood Flooring	Remaining Allowance:
	Price:	$2,304.50	Flooring $5,000.00 / $5,000.00
	Selection:	Flooring	
	Category:	09 - Flooring	
	Location:	Kitchen	View Details
	Choice:	Phenix Carpet Sonata Carpet in Composition	Remaining Allowance:
	Price:	$2,928.00	Flooring $5,000.00 / $5,000.00
	Selection:	Carpet	
	Category:	09 - Flooring	
	Location:	Upstairs	View Details

Project Running Total	Favorites		Projected Total with Favorites
$412,319.95	$5,232.50	2 ★	$412,552.45

Approve All Favorited Selection Choices

Additional Comments:

500   Characters Remaining.

Disclaimer

☐ I confirm that my action here represents my electronic signature and is binding.

Approve All

Selection Choice Details ✕

Shaw Change In Attitude Carpet in Game Up
Parent Selection: Carpet
Category: 09 - Flooring / **Location:** Upstairs

‹ Phenix Carpet Sonata Carpet in Composition   Phenix Carpet Beale Street Carpet in Cary ›

Shaw Change In Attitude Carpet in Game Up	Quantity	Unit Price	Price
5520 - Flooring	1200	$2.89	$3,468.00

Total Price: $3,468.00

🔄 Pending

★ Save to Favorites

Approval Comments:

500   Characters Remaining.

☐ I confirm that my action here represents my electronic signature and is binding.

Confirm Approval

Product Link:
http://www.nfm.com/DetailsPage.aspx?productId=7111867

Product Description:

Description

The Change In Attitude carpet perfectly represents the Queen Carpet which provides a broad range of affordable, one of a kind, innovative carpet styles, suitable for transforming any room in your home. Queen Carpet is one of the oldest and most reliable brands from Shaw Carpet Mills

Attached File(s):

In order to approve a choice that has not been favorited you may 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 may review all information before checking the disclaimer and confirming your approval.

Selections are a vital part of your project, and it is very important that you take the time to carefully review your choices to ensure you're getting exactly what you want. If you wish to receive pricing for an upgrade item, simply click the "Request Pricing" button within the selection. You'll be notified once pricing has been added. If you wish to proceed, approve the newly priced choice. We will then generate a change order for you to sign that will include an updated contract price.

12 - 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. You will have the ability to add warranty claims up to your 2-year warranty expiration date. To do this, follow the steps below.

1. Login to your portal
2. Click the "Warranty" button at the top of your screen
3. Click the green "New Claim" button at the top left-hand corner of the window.
4. Give the warranty request a title, assign a category, and priority, then list any additional details in the description box.
5. If you wish to add photos, you may do so by using the attachments "Add" button.
6. Once complete, click the save button. We will be notified and will be in touch soon.

Once a service appointment has been performed you will receive a notification requesting feedback to your contractor. Please complete this by clicking on the "Feedback Required" link.

13 - Surveys

Once you project has been completed, you will receive a notification stating a survey is ready and waiting for your response. We would greatly appreciate it if you took the time to fill out this survey. Your responses are taken very seriously. Upon receiving the email notification, either click the link within the email, or login to your portal and click the "Surveys" button at the top of your screen. The survey title will be visible, click this and then proceed to fill out the survey.

14 - Invoices

The invoices tab will allow you to view any progress billings or change order invoices that have been released for you job. If enabled for you account, you will be able to make credit card and ACH bank transfers to complete payments on change orders and progress billings. If you're working with a lender, this will only apply to change order payments. We currently only accept payments via credit card in amounts up to $5,000 per transaction. There is no amount limit on ACH transfers.