

BUILDERTREND

EXTENDED PROFILE

OVERVIEW

Buildertrend is a cloud-based construction management software designed to streamline operations for home builders, remodelers, and specialty contractors.

It offers a comprehensive suite of tools to manage projects, finances, sales, and client communications within a single platform.

KEY FEATURES

- **Project management:** Buildertrend provides scheduling tools, daily logs, and to-do lists to help teams stay organized and on track. The platform facilitates seamless communication among team members, subcontractors, and clients through built-in messaging features.
- **Financial management:** Users can create and manage estimates, budgets, and invoices. The software supports payment processing and change order management, offering instant financial reporting to keep projects financially transparent.
- **Customer Relationship Management (CRM):** The built-in CRM system allows for effective lead management, proposal generation, and email marketing campaigns, aiding in the growth of the business.
- **Mobile accessibility:** Available on iOS and Android devices, the Buildertrend app enables users to access project information, communicate with stakeholders, and manage tasks from anywhere.
- **Integrations:** Buildertrend integrates with popular accounting software like QuickBooks and Xero, ensuring synchronization between project management and financial records. This integration streamlines job costing and expense management.

SUPPORT AND TRAINING

Buildertrend emphasizes customer support by providing unlimited training resources, including daily webinars, a comprehensive earning community, and a 24/7 Help Center.

For personalized assistance, users can opt for onsite consulting services, where Buildertrend's team collaborates directly with the company to optimize software utilization.



SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Buildertrend
INDUSTRY	
AEROSPACE & DEFENSE	×
AUTOMOTIVE	×
CHEMICAL	×
CONSTRUCTION	✓
COSMETICS	×
ELECTRONICS	×
ENERGY/POWER/UTILITIES	×
ENGINEERING	×
FASHION	×
FINANCIAL SERVICES	×
FOOD & BEVERAGE	×
LOCAL GOVERNMENT	×
MEDIA	×
MEDICAL & HEALTHCARE	×
METALWORKING	×
OILFIELD	×

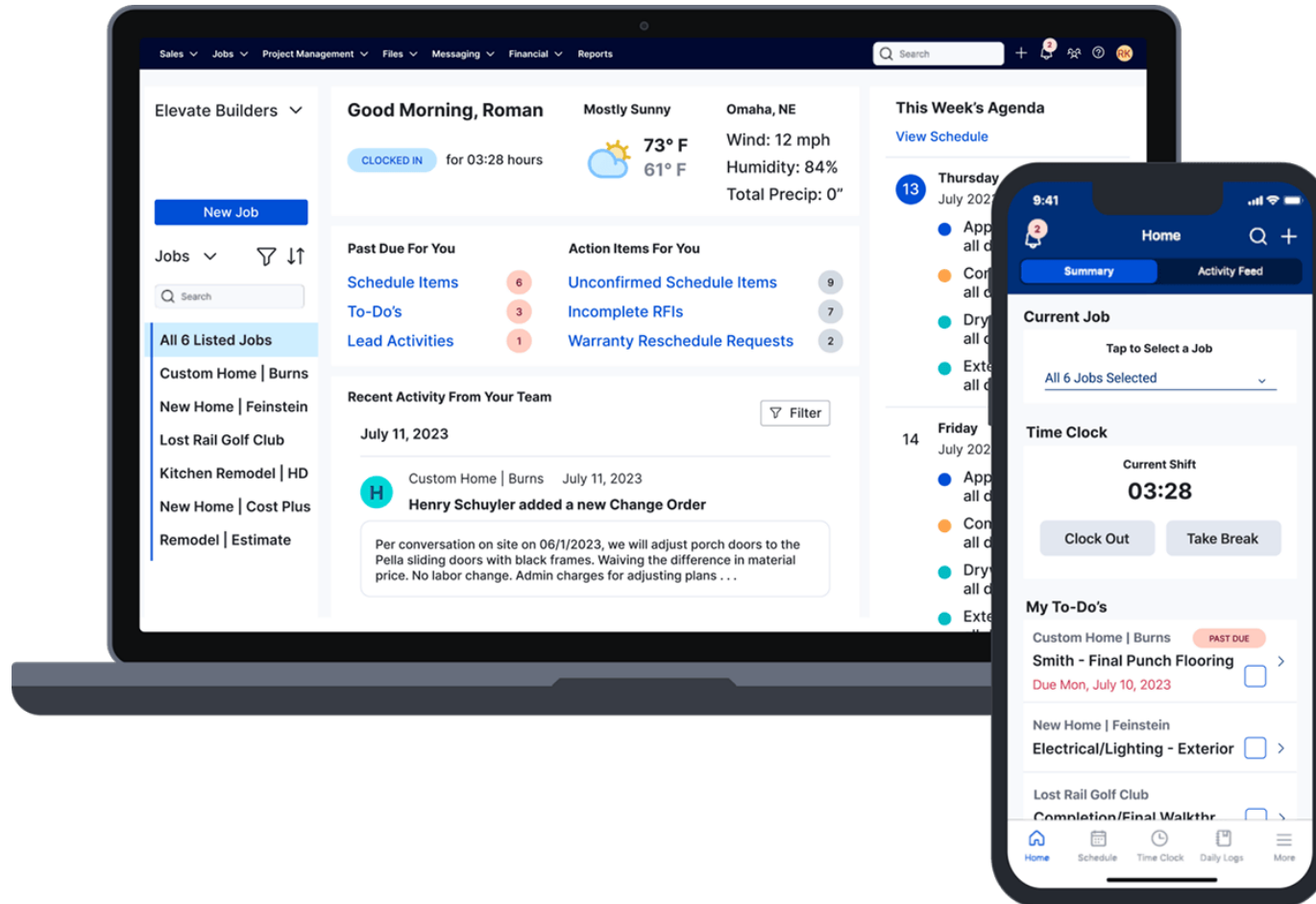
PACKAGING	×
PAINT & ADHESIVES	×
PHARMACEUTICAL	×
PLASTICS & RUBBER	×
PRINT & DESIGN	×
RENTAL	×
TELECOMMUNICATIONS	×
WOODWORKING	×
CANNABIS	×
EDUCATION	×
NONPROFIT	×
ERP SOFTWARE FEATURES	
BILLING	✓
BUSINESS INTELLIGENCE/ANALYTICS	✓
COSTING	✓
CRM	✓
CUSTOMER SERVICE	✓
PRODUCT DESIGN	×
FINANCIALS & ACCOUNTING	✓
HR	×
INVENTORY MANAGEMENT	✓
ORDER MANAGEMENT	×
PLANNING & SCHEDULING	✓
PROJECT MANAGEMENT	✓
PURCHASING	✓

QUALITY CONTROL	×
SALES	✓
SHIPPING & DISTRIBUTION	×
SUPPLY CHAIN MANAGEMENT	×
WAREHOUSE MANAGEMENT	×
ASSET MANAGEMENT	×
DOCUMENT MANAGEMENT	✓
CUSTOMER SUITABILITY	
ENTERPRISE (1000+ EMPLOYEES)	×
MEDIUM SIZE (251-1000 EMPLOYEES)	✓
SMALL BUSINESS (1-250 EMPLOYEES)	✓
ADDITIONAL PRODUCT INFO	
MULTI LANGUAGE	×
MULTI CURRENCY	×
CUSTOMIZABLE	✓
SYSTEM HOSTING	
CLOUD	✓
INSTALLED ON PREMISE	×
SUPPORT LOCATIONS	
AFRICA	×
ANTARCTICA	×
ASIA	×
AUSTRALIA	×
EUROPE	×
NORTH AMERICA	✓

SOUTH AMERICA	×
FURTHER INFORMATION	
PRICING	Not publicly available (quotes include unlimited users).



SOFTWARE SCREENSHOTS



All 8 Listed Jobs

Owner Invoices

ExportFilterNew

Job running total

Amount paid

Remaining balance

\$223,854

- \$76,920 =

\$146,934

Invoices

Payments

Credit Memos

Owner	Job	ID #	Title	Status	Total Price	Amount Paid	Balance
Lopez	1831 Park St.	552985	Deposit	PAID	\$20,000	\$20,000	\$0.00
Willson	200 Main St.	552986	Final Pay	PAID	\$14,480	\$14,480	\$0.00
Smithfield	58 Maple Ave.	552987	Draw 1	PENDING	\$24,850	\$24,850	\$0.00
Jasper P.	1412 Sunset Ave.	001	Deposit	PENDING	\$17,590	\$17,590	\$0.00
Carter	40 Gould Ave.	552985	Final Pay	UNRELEASED	\$41,510	\$0.00	\$41,510
Anderson	710 Lilac Circle	552988	First Draw	UNRELEASED	\$22,424	\$0.00	\$22,424
Davis	1619 Sunset Ave.	001	Draw 3	UNRELEASED	\$32,000	\$0.00	\$32,000
Totals					\$172,854	\$76,920	\$95,934

Company Settings

CancelDisconnect from XeroSave

You are connected to Xero.

Xero Units Center, CT

Accounting Options

Job Options

Owner Invoice Options

Accounting Options

Flat Fee Inventory Item

Buildertrend Flat Rate

Accounts Receivable Account

BT CDS 123

Deposit Online Payments

Undeposited Funds

Expense Account For Online Transaction Fees

Payment Processing Fee

Tax Option

Ignore Tax

Tax Inclusive

Tax Exclusion

Welcome, Jon & Linda Burns!

2701 N 58TH ST
OMAHA, NE

Project financials

Contract price\$899,810.00

Price adjustment-\$28,400.00

Current price\$864,208.00

\$360,700.00

Total paid

\$338,910.00

Remaining to pay

Next payment\$4,200

Due Nov 15, 2024

Pay Now

Action Items

Incomplete to-dos

Upcoming selections

Unread documents

Upcoming invoices

Upcoming deposits

Project updates

Daily Report

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Communications

Messages

Chats

Project schedule

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Temporary Electric

Rough Grade

Framing

Job Costing Budget

Approved Budget\$417,286

Spent to Complete\$480,000

Approved Budget\$417,286

Spent to Complete\$480,000

COST CATEGORIES

Cost Codes

01-General Requirements

0005 Permits & Fees

0010 Building Permits

0015 Close-Up

02-Materials

03-Labor

04-Equipment

05-Subcontractors

06-Other

07-Contingency

08-Reserve

09-Other

10-Total

Purchase Order

General Information

Approved

Purchase Order #

PO 0005

Title

0005 Permits & Fees

Assigned to

01-23 Hulshagen Custom...

Scheduled Completion

Choose Date

Link to Schedule Item

Completion Date

09-10-2024

Cost

Add From Catalog

Item

Unit Cost

Quantity

Unit

Builder Cost

0005 Permits & Fees

\$25,000

13000

--

\$25,000.00

Item

Save & New

Save