

# **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	×

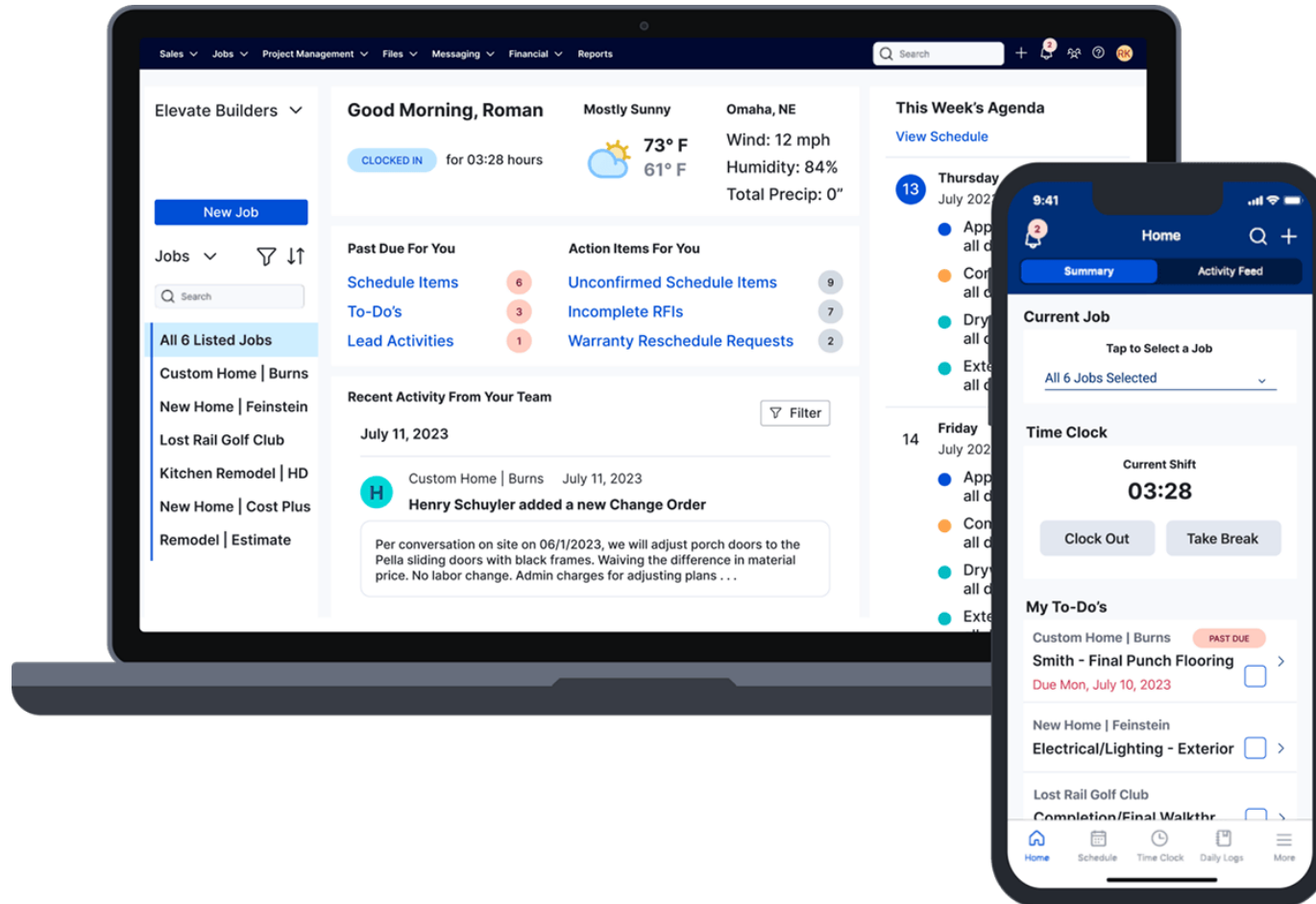
PACKAGING	×
PAINT & ADHESIVES	×
PHARMACEUTICAL	×
PLASTICS & RUBBER	×
PRINT & DESIGN	×
RENTAL	×
TELECOMMUNICATIONS	×
WOODWORKING	×
CANNABIS	×
EDUCATION	×
NONPROFIT	×
ERP SOFTWARE FEATURES	
BILLING	✓
BUSINESS INTELLIGENCE/ANALYTICS	✓
COSTING	✓
CRM	✓
CUSTOMER SERVICE	✓
PRODUCT DESIGN	×
FINANCIALS & ACCOUNTING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



**Job Costing Budget**

**417,286** Actual Budget 0000-0000 **480,000** Estimated Budget 0000-0000

**COST OVERVIEW**

Cost Codes	Committed Costs	Actual Costs
00 - General Requirements	\$45,000	\$45,000
0005 Permits & Fees	\$25,000	\$14,000
0000 Building Permits	\$75,000	\$14,000
0010 Clean Up	\$5,000	\$4,000

**Purchase Order**

**General Information**

**Purchase Order #**  
PO 10000


**Title**  
0005 Permits & Fees

**Assigned to**  
Scheduling Department

**Completion Date**  
09-10-2024

**Cost**

Items	Unit Cost	Quantity	Unit	Subtotal Cost
0005 Permits & Fees	\$25,000	1.0000	--	\$25,000.00



**Welcome, Jon & Linda Burns!**  
2701 N 58TH ST  
OMAHA, NE

### Project financials

Contract price	\$550,010.00	\$360,700.00
Price adjustment	-\$35,450.00	Total paid
Current price	\$514,560.00	\$338,910.00
		Remaining to pay







Next payment  
**\$4,200**  
Due Nov 16, 2024  
[Pay Now](#)

### Action Items

- Incomplete to-do's
- Upcoming selections
- Unread documents
- Upcoming invoices
- Upcoming deposits

### Project updates

Daily Report

### Communications

- Messages
- Chats

### Project schedule

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
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Temporary Electric

Rough Grade

Framing