



# **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     | ✗            |
|                        | ✗            |

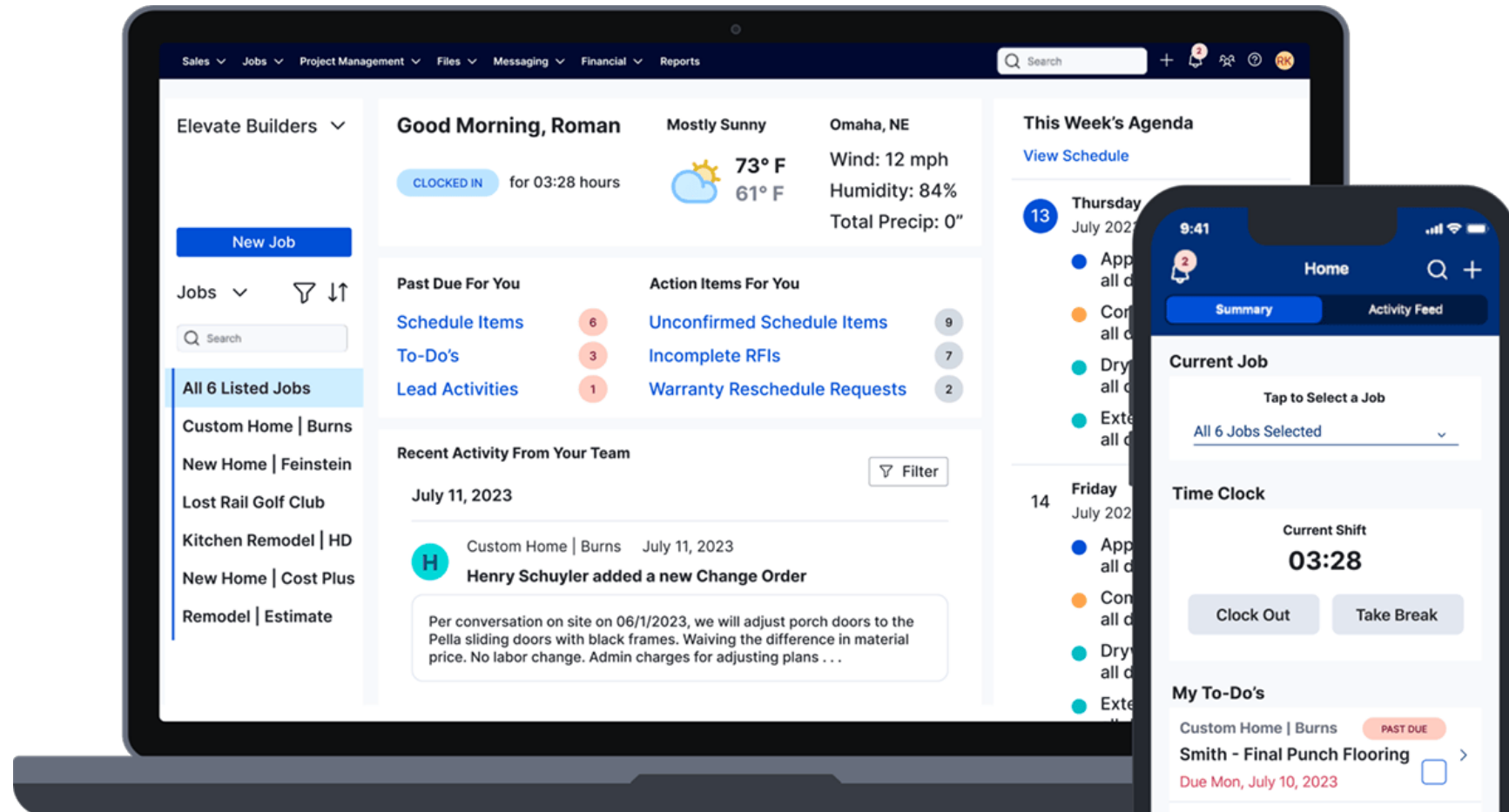
|                                 |   |
|---------------------------------|---|
| FOOD & BEVERAGE                 |   |
| LOCAL GOVERNMENT                | ✗ |
| MEDIA                           | ✗ |
| MEDICAL & HEALTHCARE            | ✗ |
| METALWORKING                    | ✗ |
| OILFIELD                        | ✗ |
| 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) | ✗ |
|                              | ✓ |

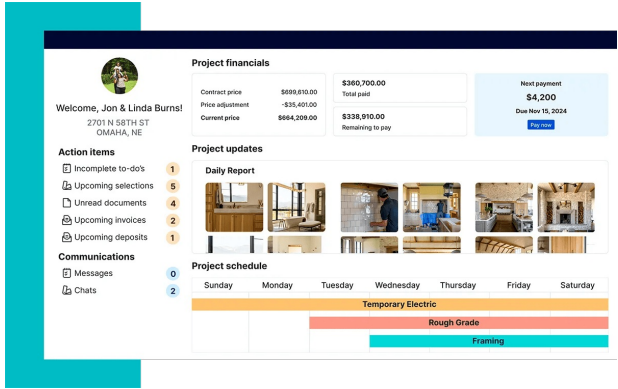
|                                  |  |
|----------------------------------|--|
| MEDIUM SIZE (251-1000 EMPLOYEES) | ✓  |
| SMALL BUSINESS (1-250 EMPLOYEES) |  |
| ADDITIONAL PRODUCT INFO          |  |
| MULTI LANGUAGE                   | ✗  |
| MULTI CURRENCY                   | ✗  |
| CUSTOMIZABLE                     | ✓  |
| 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 Cost Budget**

Approved Budget: **417,286** | Actual Costs: **\$215,000** | Cost to Complete: **\$202,000** | Approved Budget: **480,000** | Actual Budget: **\$244,000** | Cost to Complete: **\$236,000**

**COST CATEGORIES**

| Cost Codes                | Committed Costs | Actual Costs |
|---------------------------|-----------------|--------------|
| 01 - General Requirements | \$45,000        | \$43,000     |
| 0005 Permits & Fees       | \$25,000        | \$24,000     |
| 1010 Building Permits     | \$15,000        | \$14,500     |
| 0015 Clean Up             | \$5,000         | \$4,500      |

**Purchase Order**

**General Information**

Title: 0005 Permits & Fees  
 Assigned to: 01-23 Hufnagel Custo...  
 Completion Date: 09-10-2024


**Cost**

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

Cancel

Disconnect from Xero

Save



You are connected to Xero.  
[Xero Help Center](#)

Accounting Options

Job Options

☒ Create new contact in Xero when creating a new job in Bulldozerend

Owner Invoice Options

Flat Fee Inventory Item

Bulldozer Flat Rate

Accounts Receivable Account

BT COO 123

Deposit Online Payments

Undeposited Funds

Expense Account for Online Transaction Fees

Payment Processing Fee

Tax Option

☒ Ignore Tax

☐ Tax Inclusive

☐ Tax Exclusive