

# Buildertrend

Infinite potential. **Total control.**



[buildertrend.com](https://buildertrend.com)

“

Construction is so prone to human error because there are so many moving parts. It's not if mistakes will happen – it's when. One of the biggest returns on investment for us is being able to manage those mistakes, and Buildertrend really helps with that.”

Joe Christensen  
Co-founder of Cardinal Crest Homes in  
Kansas City, Missouri



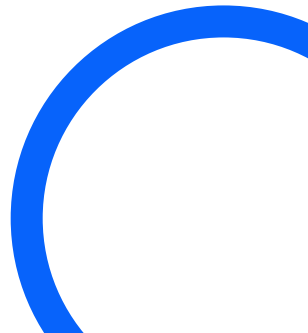
## Where chaos ends, confidence begins.

For nearly two decades, Buildertrend has been the proven platform trusted by established general contractors. We're built for contractors who need help navigating complex projects and driving long-term growth.

### Why do builders choose Buildertrend?

- **Financial control:** Estimate costs, track expenses and increase profits with unmatched financial tools.
- **Streamlined operations:** Centralize project scheduling, communication and more on one platform.
- **Proven results:** Customers using our project management software have seen results like procuring \$10 million in work each year.

Forget juggling disconnected tools. With Buildertrend, everything you need is in one place – so you can focus on what you do best: building exceptional homes and growing your business.





# The difference is **night** and **day**.


Why get lost navigating a constellation of disconnected tools when Buildertrend delivers it all in one powerful platform? From selections and takeoff to financials and project management, our software gives you everything in one place. Other systems may give you fragments, but only Buildertrend delivers the full picture. It's more than software – it's the foundation for running your business with confidence and control.

## **Simplify your project management by consolidating your tools into one streamlined solution**

Stop juggling multiple systems. Buildertrend consolidates scheduling, budgeting and communication tools into one platform, streamlining your processes and empowering your team to focus on building.

## **Enhance communication with clients and subcontractors for seamless collaboration**

Miscommunication can derail projects. Buildertrend's tools like the Client Portal, Daily Logs and Messages keep everyone informed, ensuring clarity and delivering exceptional experiences.



## **Gain clear visibility into your business financials to make informed decisions**

Avoid costly mistakes with real-time tracking for budgets, expenses and purchase orders. Buildertrend keeps your financials accurate and transparent, helping you maximize profitability.

## **Keep job progress on track with consistent and efficient workflows**

Inconsistent processes slow you down. Buildertrend's customizable templates and automated tools ensure efficient operations, so you can complete projects faster and maintain a healthy work-life balance.



Be one of the **1+ million construction pros** who've completed  
over two million projects with the help of Buildertrend.



# Buildertrend features

## One platform. Infinite possibilities.

### Job management

Run every job site efficiently

**Change Orders:** Create, manage and track change orders easily.

**Daily Logs:** Clear up day-to-day confusion and keep everyone informed.

**Requests for information:** Draft, assign and send questions within Buildertrend.

**Schedule:** Keep projects on track and manage your time effectively.

**Selections:** Empower clients to easily make selection choices and track their budget.

**Time Clock:** Improve job costing and profit margins by tracking work hours.

**To-Do's:** Create and assign tasks for your team and subs.

**Warranty:** Keep track of warranties, manage claims and schedule maintenance.

### Sales process

Impress leads to win more jobs

**CRM lead management:** Keep your sales pipeline full of quality leads.

**Custom branding:** Customize your account with your company logo.

**Email marketing:** Automate email campaigns and track responses.

**Proposals:** Generate complete, detailed proposals that win jobs.

### Communication

Update everyone without a phone call

**Client Portal:** Give your clients access to their project.

**File storage:** Store and organize photos, videos and documents.

**Messages:** Manage emails and client questions in one place.

**Subcontractor Portal:** Allow subs to check updates and communicate.

**Surveys:** Get feedback from clients to help promote your business.

### Financial tools

Stay on top of every penny

**Bills:** Track bills across projects for convenience and consistency.

**Job Costing Budget:** Take control of your job costing and increase profits.

**Cost Inbox:** Manage your receipts in one organized location.

**Estimates:** Accurately predict costs, quantities, labor hours and more.

**Invoices:** Manage cash flow and ensure all clients are billed accurately.

**Purchase Orders:** Release, sign and pay out purchase orders.

**Buildertrend Takeoff:** Upload blueprints, record measurements and create estimates faster.

# Buildertrend Group Purchasing

Earn cashback and discounts  
with top brand partners

**With our material purchasing program, you can access exclusive discounts and rebates through established brand partnerships.**

## Expand profit margins

Increase revenue through Buildertrend Purchasing with access to exclusive rebates and discounts on your material purchases.

## Maximize productivity

Earning cashback is a breeze without the time-consuming search for savings. Builders get instant access to exclusive high-quality brands their clients know and love.

## Combat inflation

Use accurate and timely data on material costs to make informed decisions about purchases.

We're proud to partner with industry-leading brands including:

**GENERAC**<sup>®</sup>

build <sup>WITH</sup>  
**FERGUSON**

**FERGUSON**<sup>®</sup>

**Rinnai**<sup>®</sup>

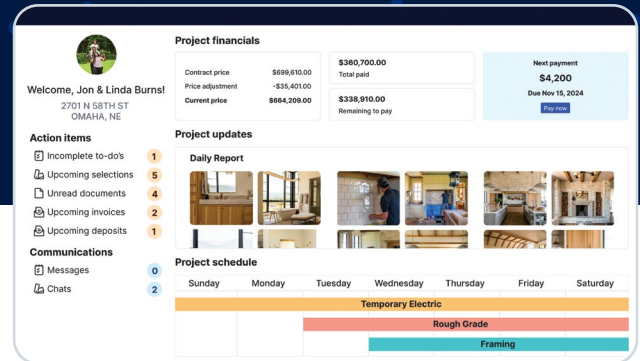
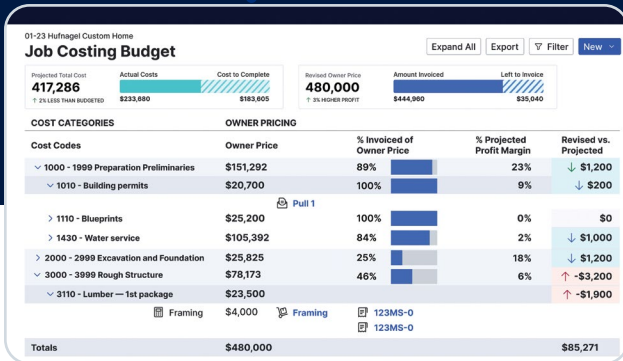
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**PRO**

# Always improving for you

## The latest and greatest product updates



### Increased financial control

- Create multiple approved proposals, so you can make changes to the project scope before the final contract is complete.
- Manage your project's health with the powerful new Job Costing Budget.
- Adjust your profit forecast in real time with on-demand projected cost adjustments.

### Collaborative client experience

- Boost client confidence with a modernized portal experience that puts the most critical information forward.
- Prioritize timely updates highlighting information that's most important to your clients.
- Leverage the power of the platform to collaborate and reduce confusion.

## What to look forward to in 2025



### See our product roadmap

- Get sneak peeks on which updates are coming next, like dynamic signature capture and a new way to update clients with the help of AI.
- Give platform feedback and submit feature requests.
- Follow along with progress updates.

[buildertrend.com/productroadmap](https://buildertrend.com/productroadmap)



# Take control of the financial future of your business

Buildertrend's financial capabilities work alongside our job management tools, boosting both efficiency and profits. Builders can now free up time to focus on what truly matters – running their business.

## Buildertrend Financing

Bridge the gap from one job to the next with business financing, or offer homeowner financing to keep projects moving.

## Insurance Services

Safeguard your company with affordable insurance options exclusive to Buildertrend customers.

## Buildertrend Payments

This secure and efficient online payment solution makes sending and receiving money a better experience for construction businesses.



# Partnerships

**Outside of our extensive tools and services, we offer additional support through partnerships with other industry leaders.**



**CBUSA**  
A Buildertrend Company

Join our exclusive group purchasing network for leading home builders, and leverage professional relationships while lowering material costs.



**BREAKTHROUGH  
ACADEMY**

As a leading business coaching organization, Breakthrough Academy helps builders with expert guidance to enhance profitability, streamline operations and achieve long-term success.



**ASSOCIATION OF  
PROFESSIONAL  
BUILDERS**

We work with the Association of Professional Builders to give you access to world-class training and resources that'll enhance your business systems and increase profitability.

**monthend**

Monthend is ideal for Buildertrend users seeking reliable, ongoing services to maintain monthly accounting, streamline financial processes and ensure accurate reporting year-round.



**BUILDER'S GoTo**

Our partnership with Builder's GoTo offers you seamless QuickBooks integration services, ensuring accurate financial management and streamlined project accounting.

**24hr  
BOOK  
KEEPER**

The detailed, compliant bookkeeping services offered by 24hr Bookkeeper complement Buildertrend's tools to offer precise financial management.



# Make the most of your investment

Instead of training on your own, you'll get a dedicated team that helps you unlock Buildertrend's full potential – fast.

## Educate and empower your team with advanced, personalized support.



### **Buildertrend University**

Join us for two days of feature-based classes, one-on-one coaching sessions and networking opportunities with fellow builders.

*See below for special show pricing.*

### **Buildertrend Learning Academy**

Access our library of on-demand, online training resources designed to help you maximize your efficiency and success with Buildertrend's features.

### **Onsite Consulting**

We come to you. This is our most in-depth training where we tailor Buildertrend to meet your goals.

### **Help Center**

Our Help Center is where builders can find clear answers, helpful tutorials and expert advice to tackle any challenge with confidence.

### **Buildertrend Champion**

Ensure your success with our software by designating a member of your team to get your company on board.

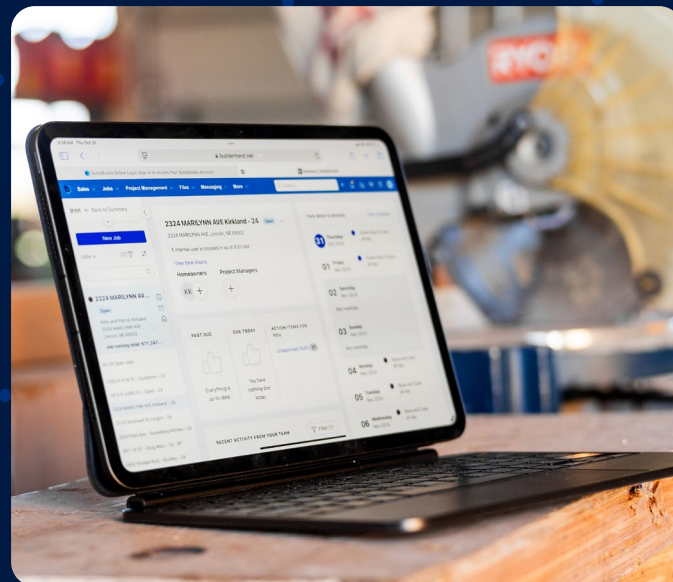
### **Strategic Business Reviews**

Work with your designated key account manager to build a personalized success plan for your team.



# Choose the support level that **builds your success**

Selecting a customer success service level is a required step to get the most out of your Buildertrend subscription. Whether you prefer self-guided training or hands-on guidance, these tiers provide the tools and expertise necessary to fully implement Buildertrend and maximize its impact on your business.



## Tier 1

Work with a dedicated setup manager to create your account, import data and integrate QuickBooks. Then, access unlimited self-paced courses, daily live training and 24/7 support via chat, email or phone.

## Tier 2

You'll get all the great resources from Tier 1, plus a dedicated account manager, custom success plans and quarterly check-ins. Enjoy one-on-one training and expert guidance to ensure a seamless rollout. Having additional support when starting Buildertrend is the fastest, most proven way to find success.

\* The italicized bullets signify benefits included in Tier 2.

### Account management

- Digital account audits
- *Kickoff call*
- *Success plan*
- *Quarterly progress check-ins*

### Onboarding

- Initial setup call
- Data migration
- QuickBooks integration assistance
- Data review call
- *Advanced account customization*
- *Product adoption training*

### Implementation

- Buildertrend Learning Academy
- Live virtual training
- Buildertrend Payments support
- *1:1 training*

### Ongoing support

- Live chat
- Email
- Phone
- 24/7 Help Center