BuilderTek User Guide

Contents

What's in this Guide?

Construction Modules

BuilderTek contains over 100 modules for a variety of uses, including sales, budgeting, human resources, vendor and product management, invoicing, and many more.

This guide focuses on the following modules in the Construction app:

- **Pre-Qual** (pre-qualifying vendors)
- **RFQs** (Requests for Quote)
- **RFIs** (Requests for Information)
- **SOVs** (Statements of Values)
- **Payment Applications**

BuilderTek contains over 100 modules!

What do those colors mean?

Prerequisites

Text with an **orange** background represents actions that come *before* a procedure.

My Optional Steps

Text with a **green** background represents optional actions that you as a BuilderTek customer can take.

Vendor / Customer Actions

Text with a **blue** background represents the "behind-the-scenes" actions of another party, such as a vendor or customer. (You as a BuilderTek customer don't do these things.)

Next Steps

Text with a **violet** background represents potential actions that may come *after* a procedure.

Pre-Qualification
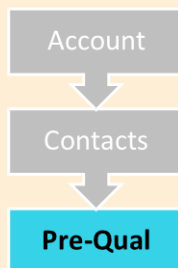
Pre-qualification is found in the **Accounts** module.

Initiating vendor pre-qualification consists of emailing a request to the vendor to fill out an attached form. After the form is filled out and returned by the vendor, you can then qualify the vendor by executing the contract. At that point, the vendor is pre-qualified, meaning your company deems them to possess the capacity, capability, and experience to fulfill a work order.

During the pre-qualification process, you collect information about the vendor, such as the following:

- Contact information
- Officers' names
- Master Business License Number
- Retail Sales Tax Number

Prerequisites

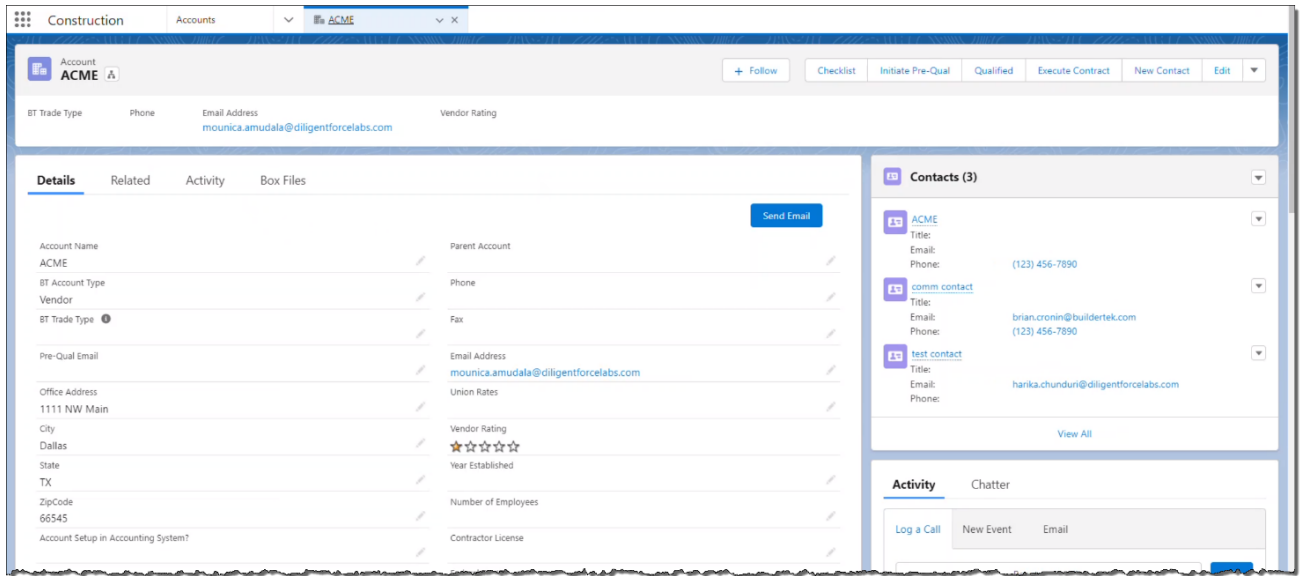Before starting the pre-qualification process, make sure you have set up the following:

Account

↓

Contacts

↓

Pre-Qual

Pre-Qualification Process

Create Account → Initiate Pre-Qual → Vendor Response → Qualify → Vendor Response → Execute MSA
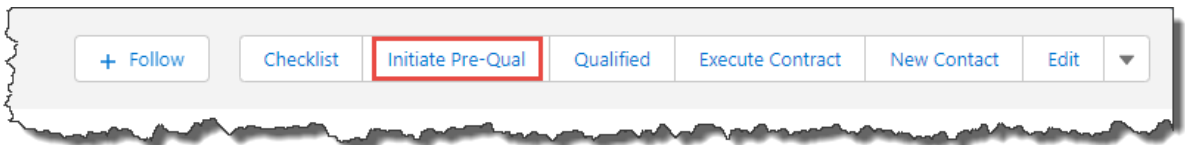
Pre-Qualify a Vendor
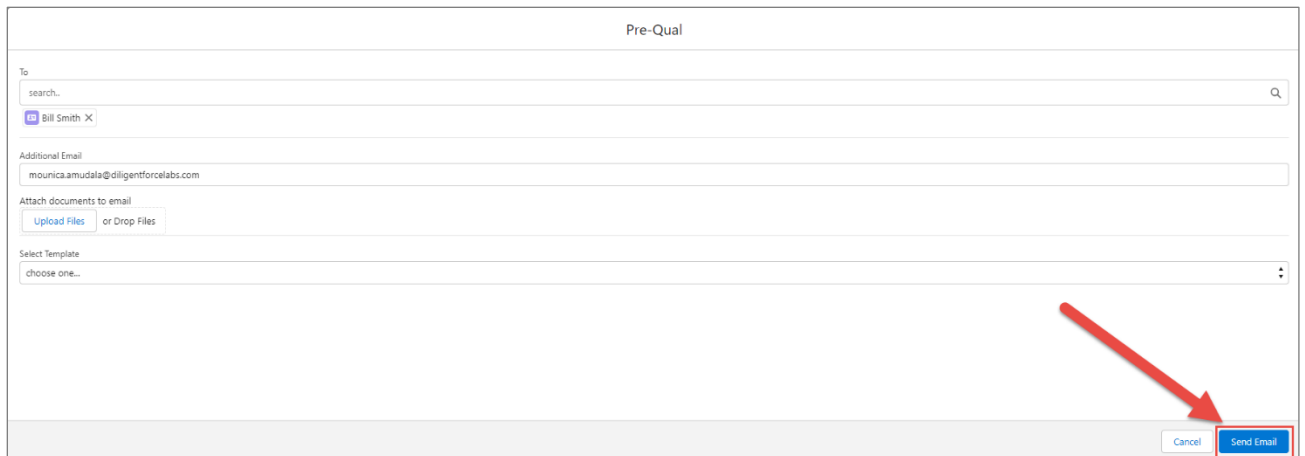
Initiate Pre-Qualification

1. Open the *Accounts* page and find the vendor you want to pre-qualify.

2. Click the **Initiate Pre-Qual** button.
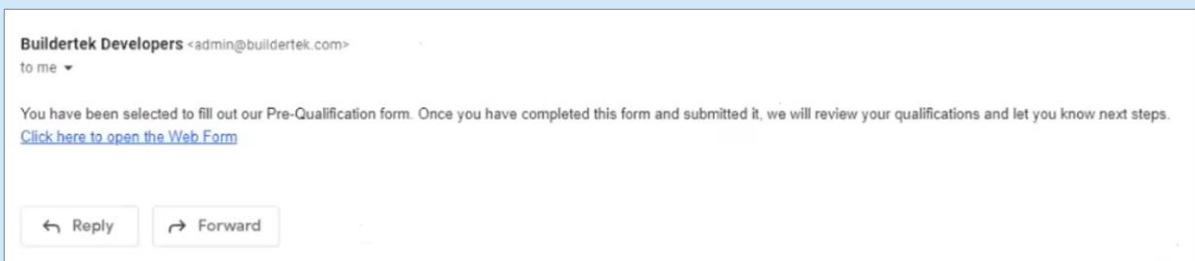

The *Pre-Qual* dialog box opens:

- By default, the Pre-Qual dialog box is populated with the Primary Contact for the account. To add other account contacts as recipients, begin entering their name in the *To* field, then select their name when it appears, or enter one or more email addresses in *Additional Email* for people who are not set up as contacts.
- You can attach documents to the email by clicking **Upload Files** and selecting the files.

3. Click **Send Email**.

Vendor Response

<div style="background-color:#2b7bba;color:white;">

On the vendor's side…

</div>

The vendor receives an email stating that they have been selected to fill out a pre-qual form:

Buildertek Developers <admin@buildertek.com>
to me ▾

You have been selected to fill out our Pre-Qualification form. Once you have completed this form and submitted it, we will review your qualifications and let you know next steps.
Click here to open the Web Form

↩ Reply   ↪ Forward

The vendor must fill out the form, sign it, and click **Submit**.

Signature

Clear Signature

Employers are required to submit the completed form to the constructor for posting/display at the project.

Cancel   Submit

Once the vendor has submitted the form, their vendor details appear in the vendor account:

4. Review the vendor details, then click **Qualified**.

A confirmation appears:

- If you need to add documentation as justification for changing the status to Qualified, click **Upload Files** and select one or more files, or select the files and drag them into the dialog box.

5. Click **Yes**.

A contract document is sent to the vendor.

On the vendor's side...

The vendor receives a contract document:
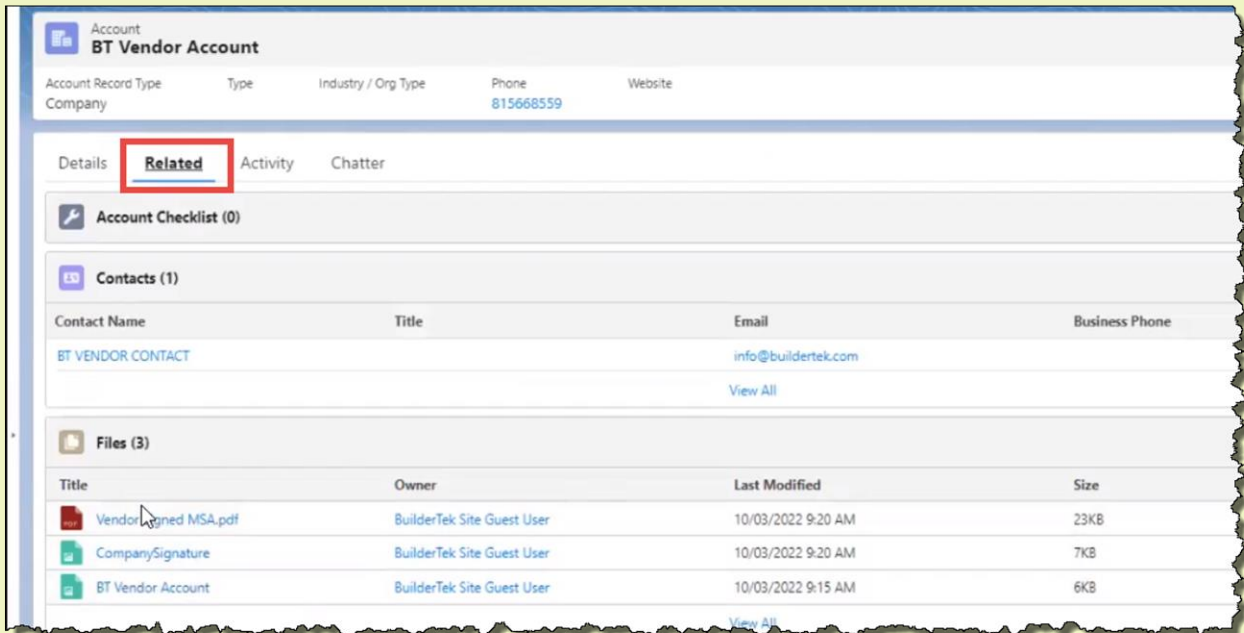

The vendor must fill out the form, sign it, then click **Submit**.
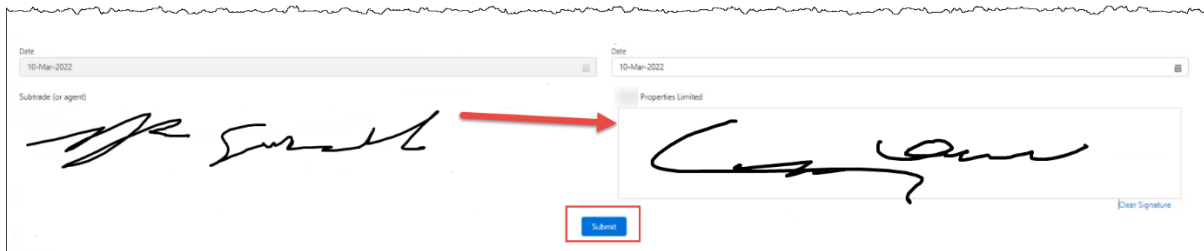
Execute the MSA

Review the document signed by the vendor…

If you want to the documents that the vendor has sent, open the *Related* tab:

6. Review the contract document, sign it, then click **Submit**.

> **Reminder:** This is the (final) internal counter-signature to the document that was signed and returned by the vendor.

7. Click **Execute GCA**.

Both parties receive copies of the signed contract. The vendor is now fully pre-qualified to work with you and will show up in downstream processes, such as Requests for Quote (RFQ).

After Pre-Qualification

After Pre-Qual
You might ask the vendor to submit a [request for quote (RFQ)](#) in order to make a bid on work or materials.

RFQ (Request for Quotes)

RFQs are located in the **Projects** module.

Request for Quote (RFQ) is the process used to gather vendor pricing for materials and labor. RFQs can be directly related to an Opportunity or saved in the PriceBook for future use.

Prerequisites
Before you can send a request for quotes, you must have the following:

Account

Contacts

Project

Pre-Qual

RFQ
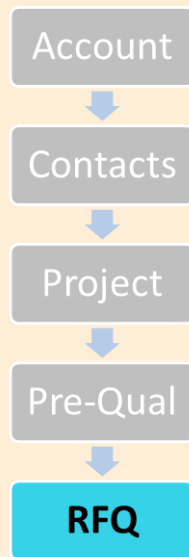
RFQ Cycle

If a vendor doesn't already have contractual pricing set up, they must go through the RFQ cycle. This can be for a single project or for a Master RFQ.

Create RFQ → Send RFQ → Vendor Response → Negotiation → Award RFQ → Accept RFQ

Create a New RFQ

Enter RFQ Details
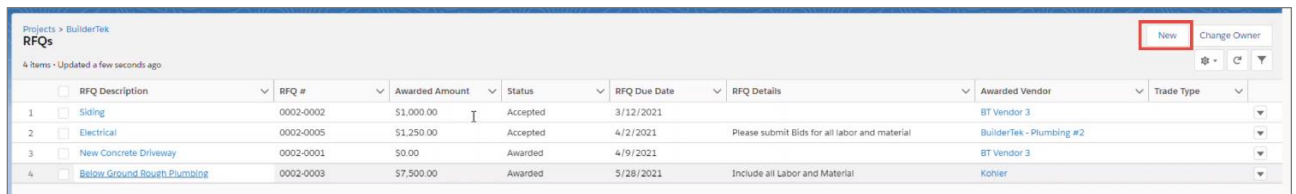
1. Open a project.
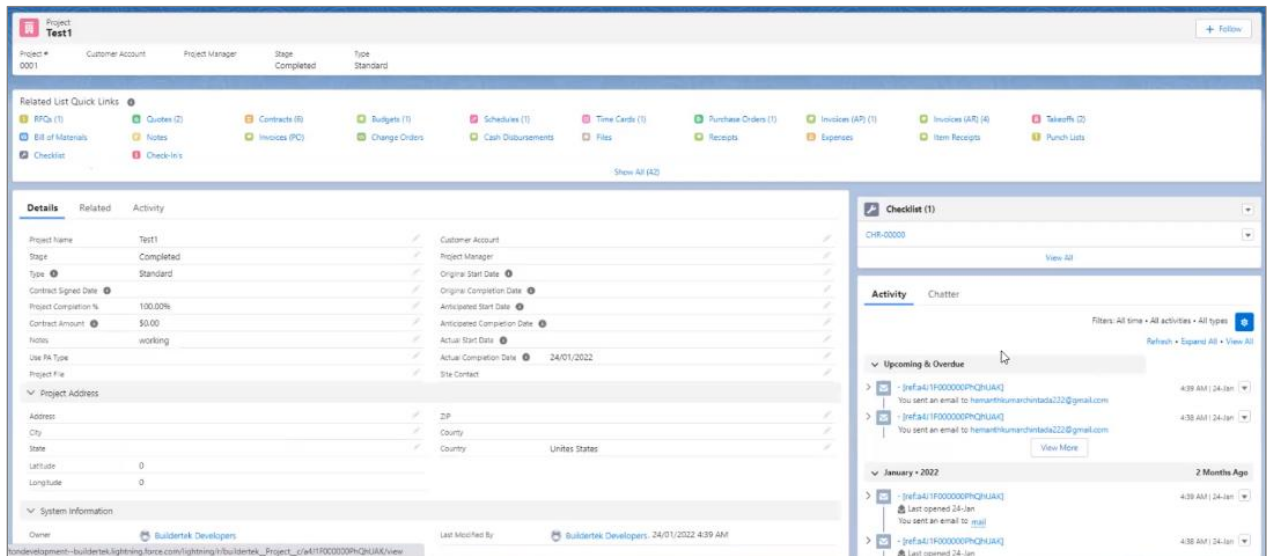
2. Click the **RFQs** icon in the *Quick Links* section.

The RFQ page opens:
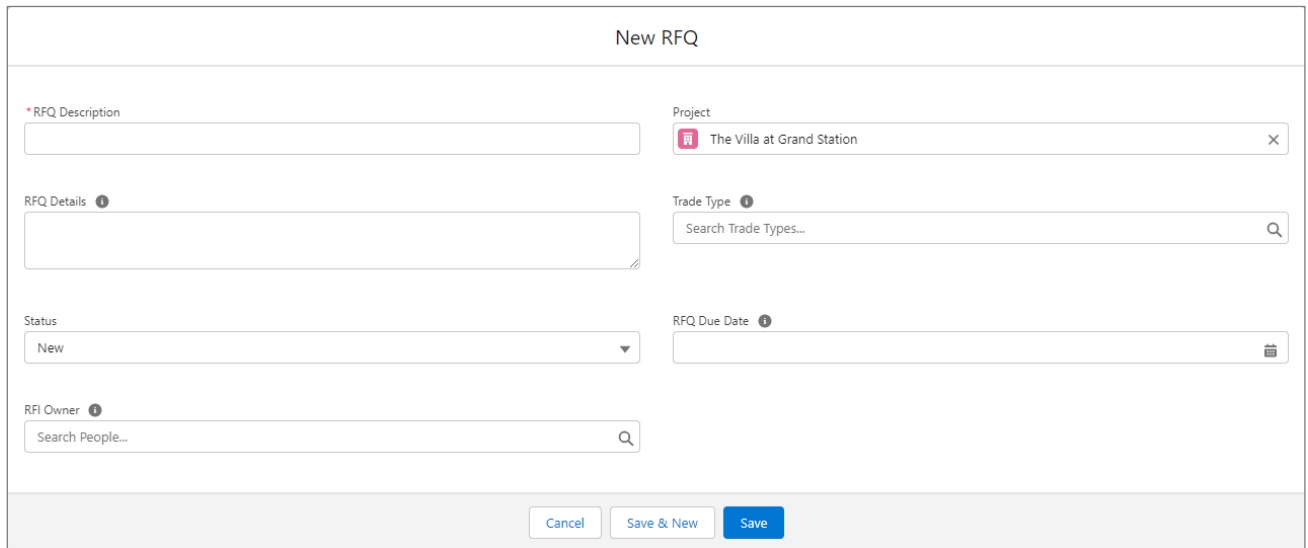
3. Click **New**.

   The *New RFQ* dialog opens.
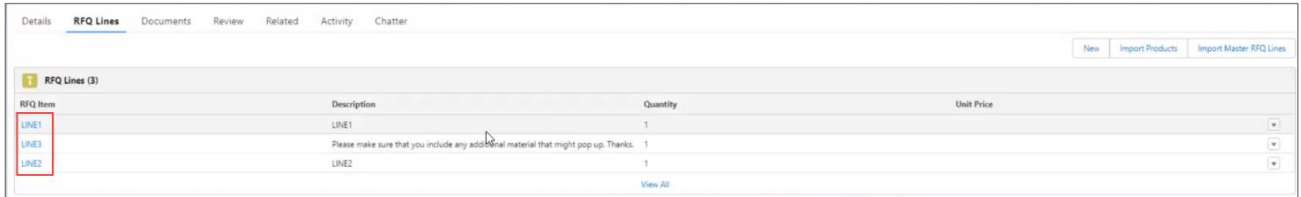
4. Enter all the information, then click **Save**.
   - **RFQ Description** (mandatory)—enter a description of the RFQ. (This is intended to be useful for *your* company.)
   - **RFQ Details**—enter any important details about the RFQ that may be helpful to the vendor.
   - **Status**—displays the status *New* by default.
   - **RFI Owner**—select the name of the person at your company who will be responsible for responding to an RFI, should one come from the vendor. (See RFIs (Requests for Information).)
   - **Project**—displays the name of the current project by default.
   - **Trade Type**—select or enter the type of trade the vendor or supplier specializes in. (If necessary, you can create a new trade type by searching on the new trade name, clicking on **Show All Results for "[trade name]"**, then clicking on **+ New Trade Type** and following the onscreen directions.)
   - **RFQ Due Date**—enter a date or select one from the calendar.

Create RFQ Lines

If necessary, you can create additional RFQ lines. If you aren't using a Master RFQ to import line items for the request, you can enter each line for materials and/or labor pricing requested manually.
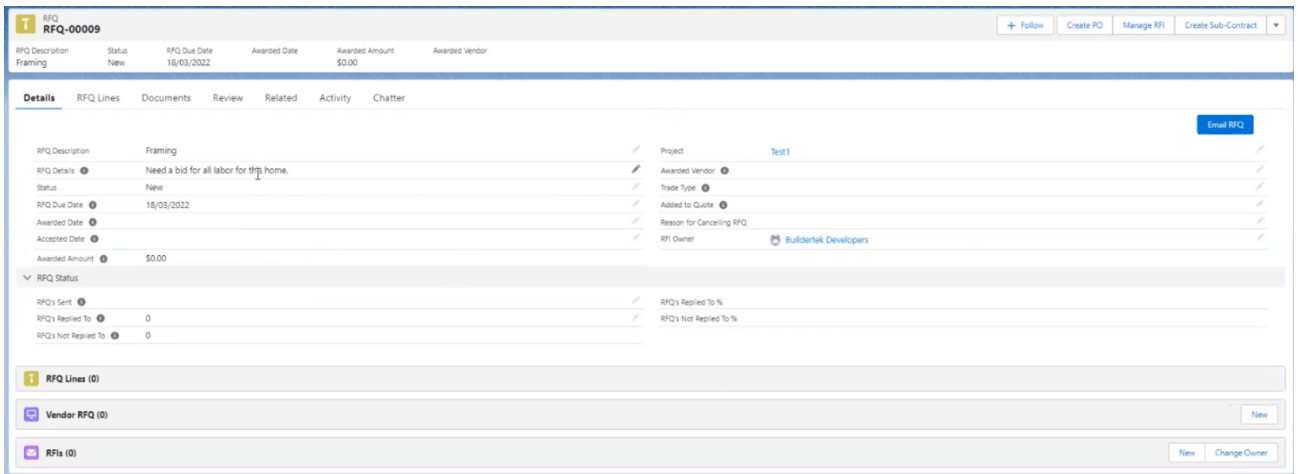
- To create a new line, finish filling out the previous line, then click **Save and New**.

5. Click **Save** to complete the RFQ lines.
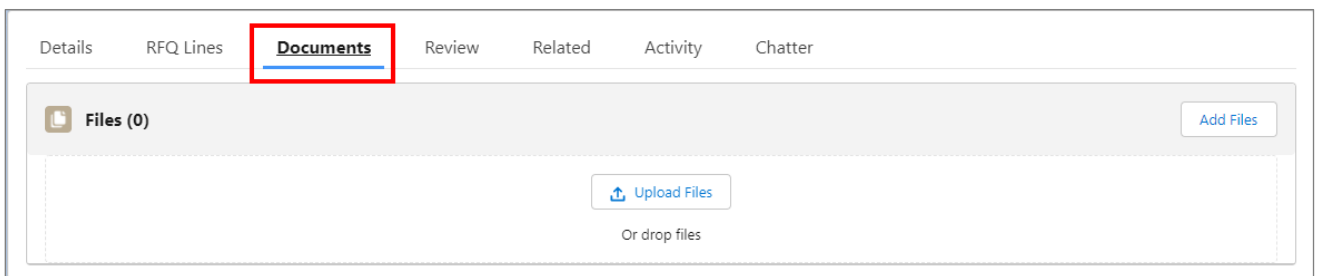
The new RFQ opens in a tab:

Add Documents

If necessary, you can add documents that may be important for the bidder to the RFQ—this could be plans, blueprints, material specs, or similar files.

To add documents, click the **Documents** tab.

- **Add Files**—click then locate and open files that have previously been uploaded.
- **Upload Files**—click and locate files and open them, or simply drag them from your computer into the *Files* pane.

Review (Select Vendors)

Note: By default, only pre-qualified vendors appear for selection.

Need to allow non pre-qualified vendors?

If you want to include non-qualified vendors, go to the *RFQ Administration* section and uncheck the **Only display pre-qualified vendors** option.

6. Open the *Review* tab.
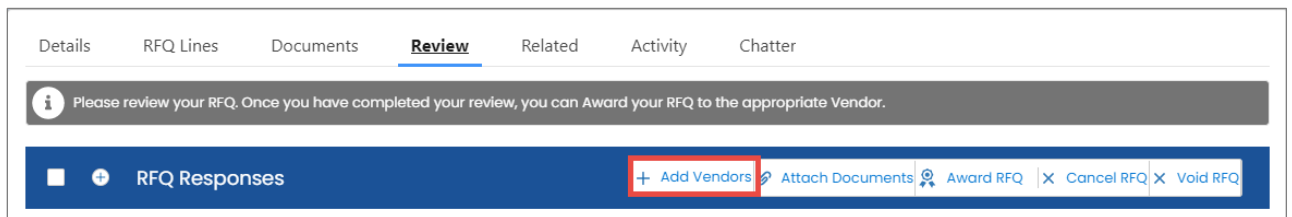
7. Click **+ Add Vendors**.

The *Add Vendors* dialog opens.

8. Check the name(s) of the vendor(s) you want to send to, then click **Add Vendors**.

9. Click the ⊕ icon to expand the *RFQ Responses* section.

10. Check the name of one or more vendors, then click **Email Vendors**.
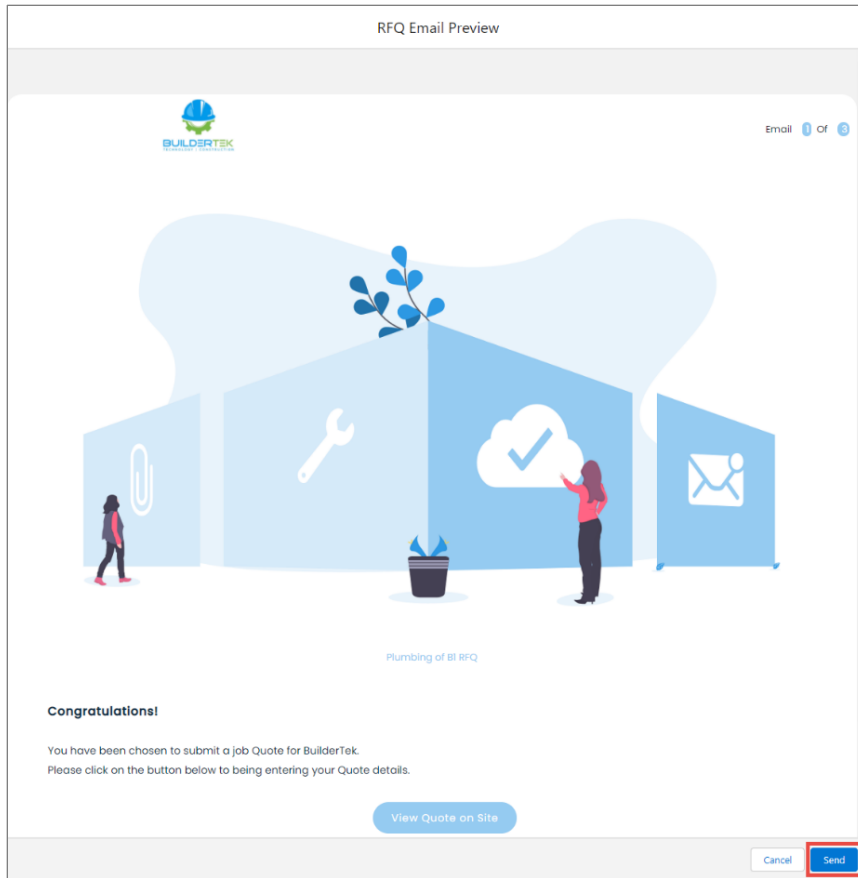
11. Click **Send**.

Verify that the emails have been sent…

If you want to verify that the emails have been sent, you can do so in the following places:

In the *RFQ Responses* section:
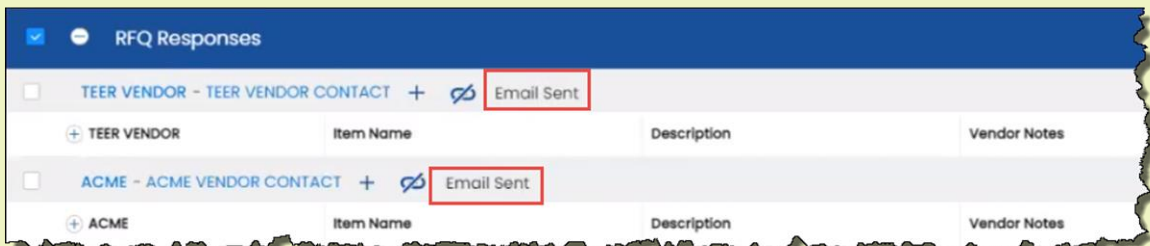
In the *Details* tab:
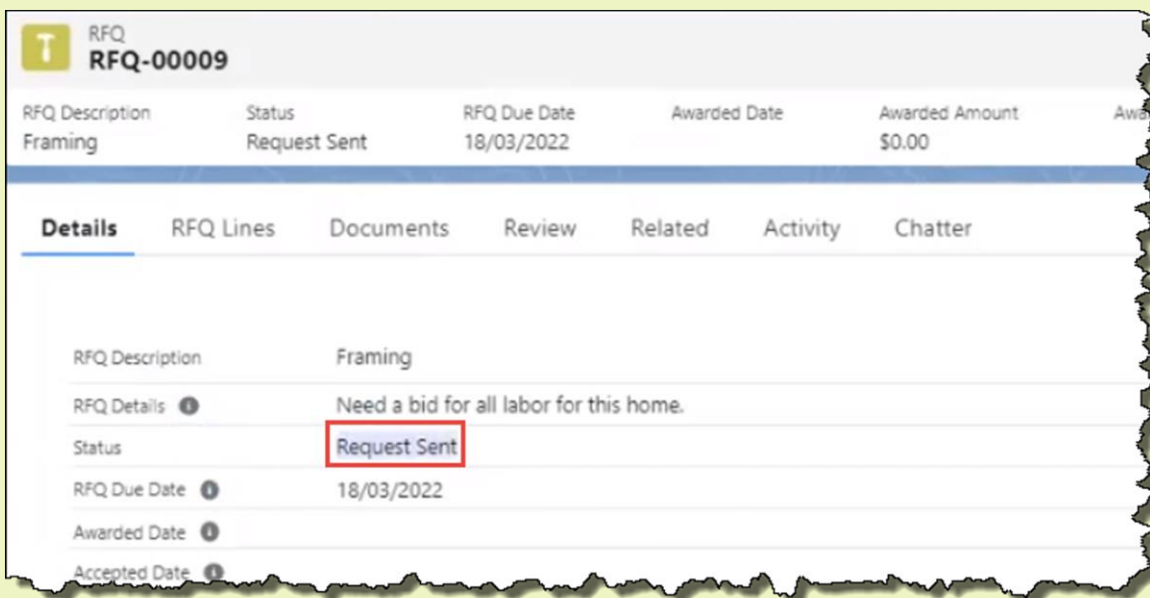
On the vendor's side…

The vendor receives an email, fills out the form with their bid, then submits their bid.

(They can come back to view their submission at any time, but cannot re-submit their bid.)

12. Go to *Review* to view their bids.
    - You can select multiple bids to compare them.
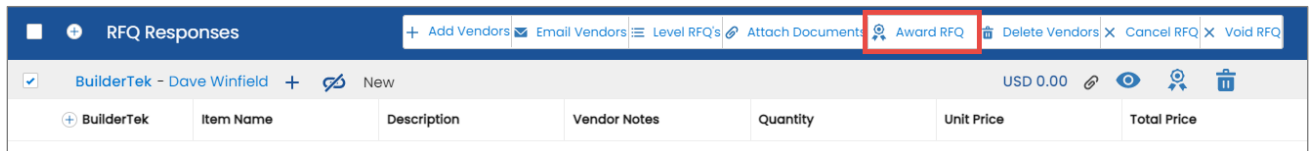
On the vendor's side…
Does your vendor have questions?
Refer them to the RFI (Request for Information) function.

Award the RFQ

13. Check the desired vendor and click **Award RFQ**.

Verify that the RFQ has been awarded...

If you want to verify that the RFQ has been awarded, you can do so in the following places:

In the *RFQ Responses* section:

In the *Details* section:

And if you look at the vendor who was awarded:

On the vendor's side…
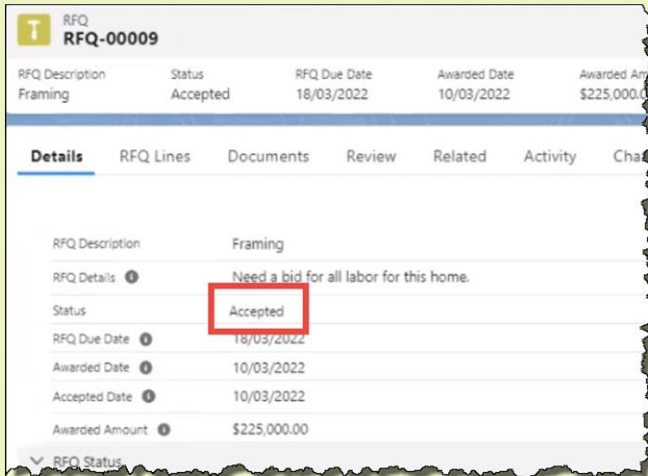
The vendor receives an email stating that they have been awarded the contract:
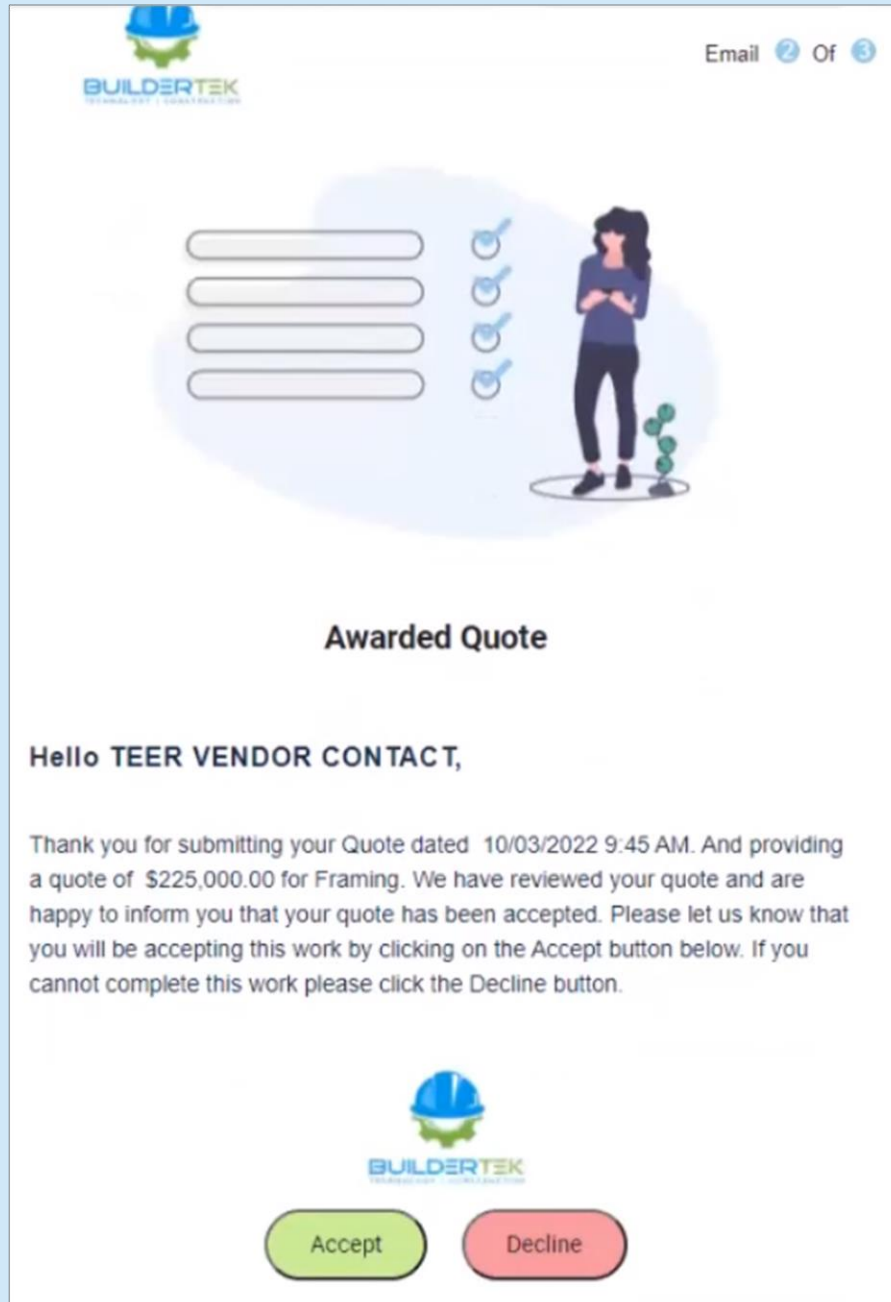
The vendor must click **Accept** in the email to confirm that they want to accept the job.

Verify that the RFQ has been accepted…

Once the vendor accepts the job, it appears as *Accepted* in the project *Details* section:

In the *Review* section:

Under *Vendor*:

On the vendor's side...

The vendor also receives an email with details of their quote:

Thank You

Hello **TEER VENDOR CONTACT,**

Thank you for accepting our Quote request. Please find the details of your quote below.

RFQ Name: TEER VENDOR CONTACT,

Item Name	Description	Quantity	Price	Total	Total Price
LINE1	LINE1	1	$75,000.00	$75,000.00	$75,000.00
LINE3	Please make sure that you include any additional material that might pop up. Thanks.	1	$75,000.00	$75,000.00	$75,000.00
LINE2	LINE2	1	$75,000.00	$75,000.00	$75,000.00

The RFQ process is finished.

After the RFQ

After RFQ…
Once the RFQ process is successfully completed, you may wish to create a purchase order (PO), generate invoices, or perform other tasks.
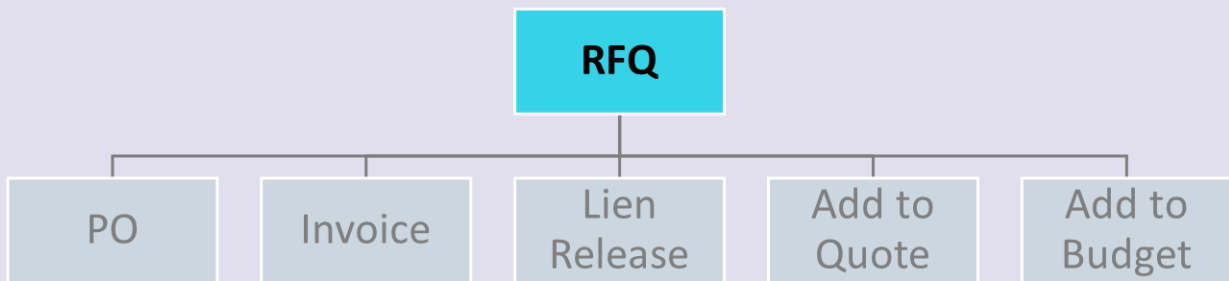
RFI (Request for Information)

RFIs are located in the **Projects** tab.

BuilderTek's Request for Information (RFI) process allows vendors and customers to ask questions through the BuilderTek platform. This allows you to easily track and manage these interactions. While RFIs can be tied to an RFQ, providing a convenient way to control bidding interactions, RFIs can also be leveraged throughout the project lifecycle.

RFI Flow

The vendor or customer submits an RFI and the company reviews and responds. (Some organizations assign a specific employee to this role.) When the initiator is satisfied, either party can close the RFI.

Customer submits RFI	Company reviews / responds	Either party closes RFI

Create an RFI

On the vendor's side…

Vendors create RFIs from inside BuilderTek's Communities.

Respond to an RFI

Once you receive an RFI from a vendor, you can respond to it to answer the vendor's questions.

SOV (Schedule of Values)

RFIs are located in the **Projects** tab.

A Schedule of Values is an industry standard approach allowing you to structure progress payments with your vendors and/or customers. Using an SOV, you can structure expected progress and payments for labor and materials in a step-by-step manner and update progress on a percentage basis.

SOV Flow

Create SOV → Import SOV → Company Submits SOV → Vendor Submits SOV → Company Approves SOV
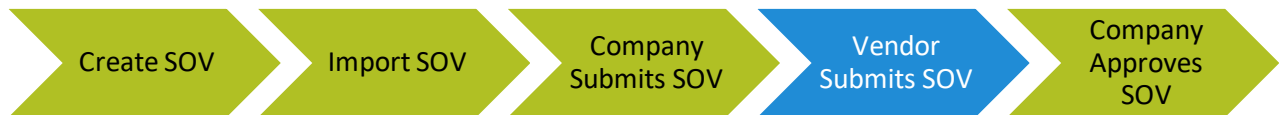
Vendor SOV

Create a Vendor SOV

1. Open a project.
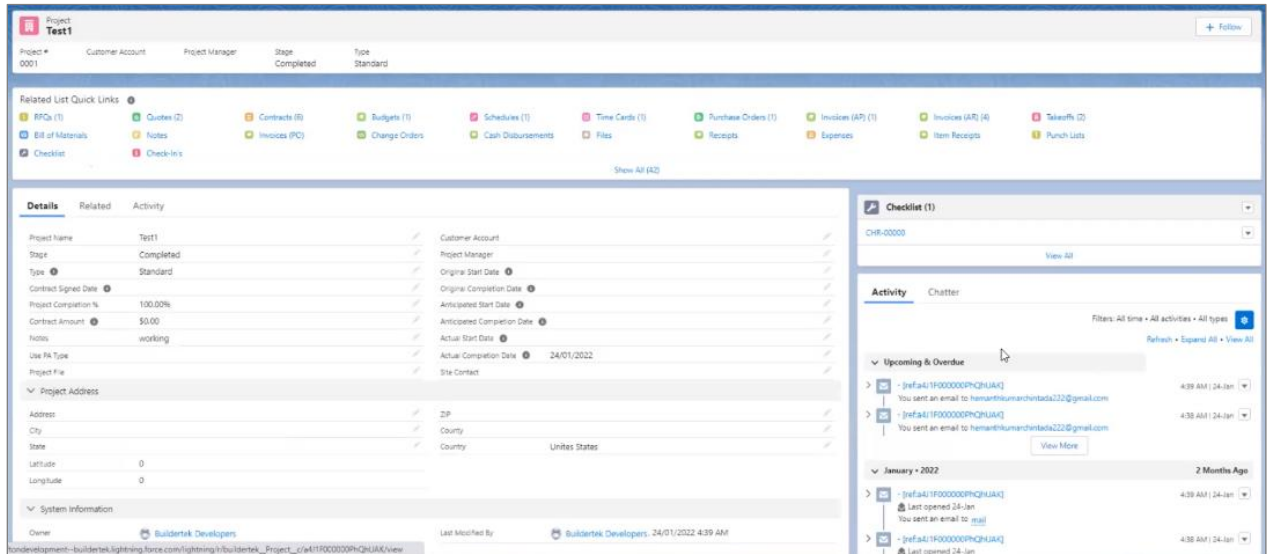
2. Click the **Schedule of Values** icon in Quick Links.
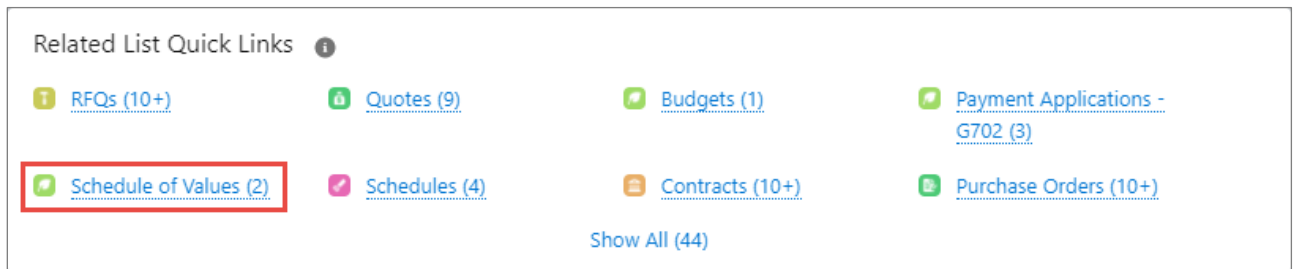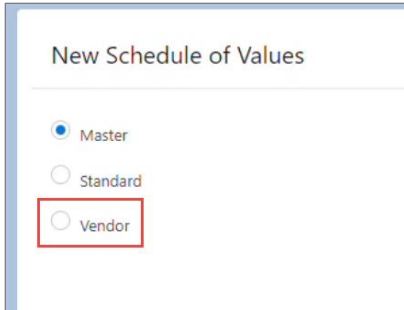
A drop-down panel opens, displaying a number of options:
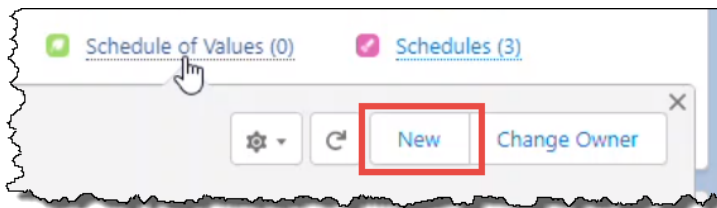
3. Click **New**.

The New Schedule of Values window opens:
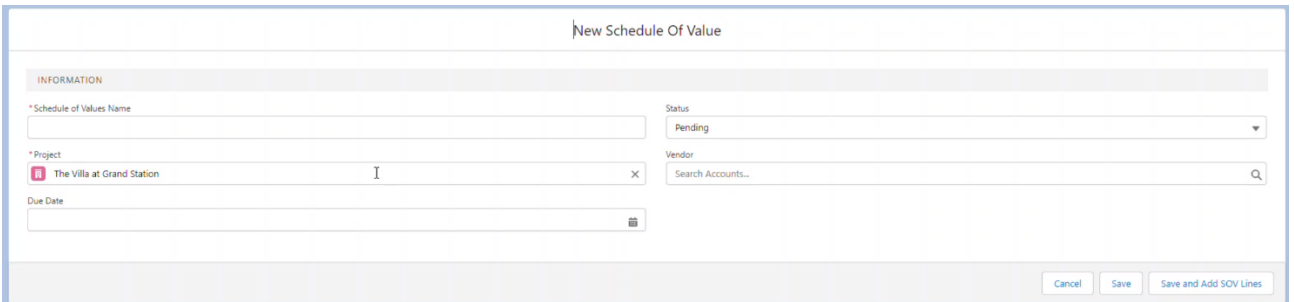
4. Select the **Vendor** option, then click **Next**.
   - **Master**—select this option to create an SOV template.
   - **Standard**—select this option to create a Standard SOV that includes all costs (including vendor costs).
   - **Vendor**—select this option to create a Vendor SOV.
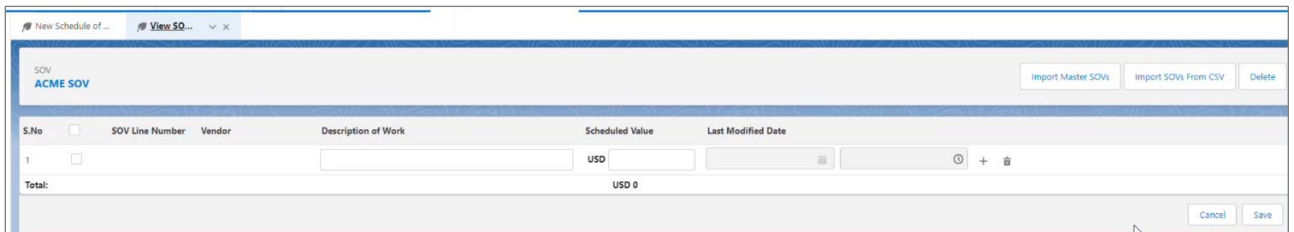
   The Information window opens:

   - **Schedule of Values Name (mandatory)**—enter a name
   - **Project**—the current project appears by default; you can select a different project if required.
   - **Due Date**—click on the calendar to select a due date.
   - **Status**—the *Pending* status appears by default; you can select a different status if required.
   - **Vendor**—select the name of the vendor that you want to start submitting SoVs.

5. Click **Save and Add SOV Lines**.

6. Continue to add SOV lines as necessary, then click **Save**.

Import a Vendor SOV

You can import a master SOV from a CSV file.

7. Click **Import an SOV from a CSV File**.

   The Import SOVs dialog opens:
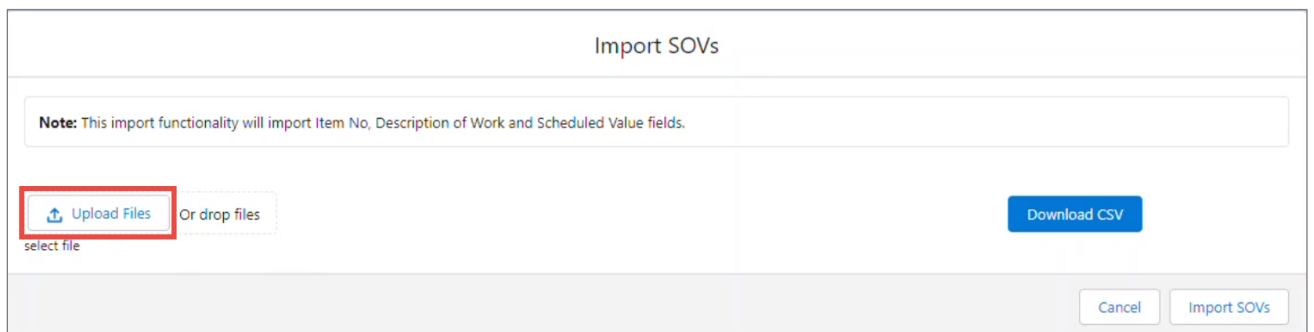
8. Click **Upload Files**.
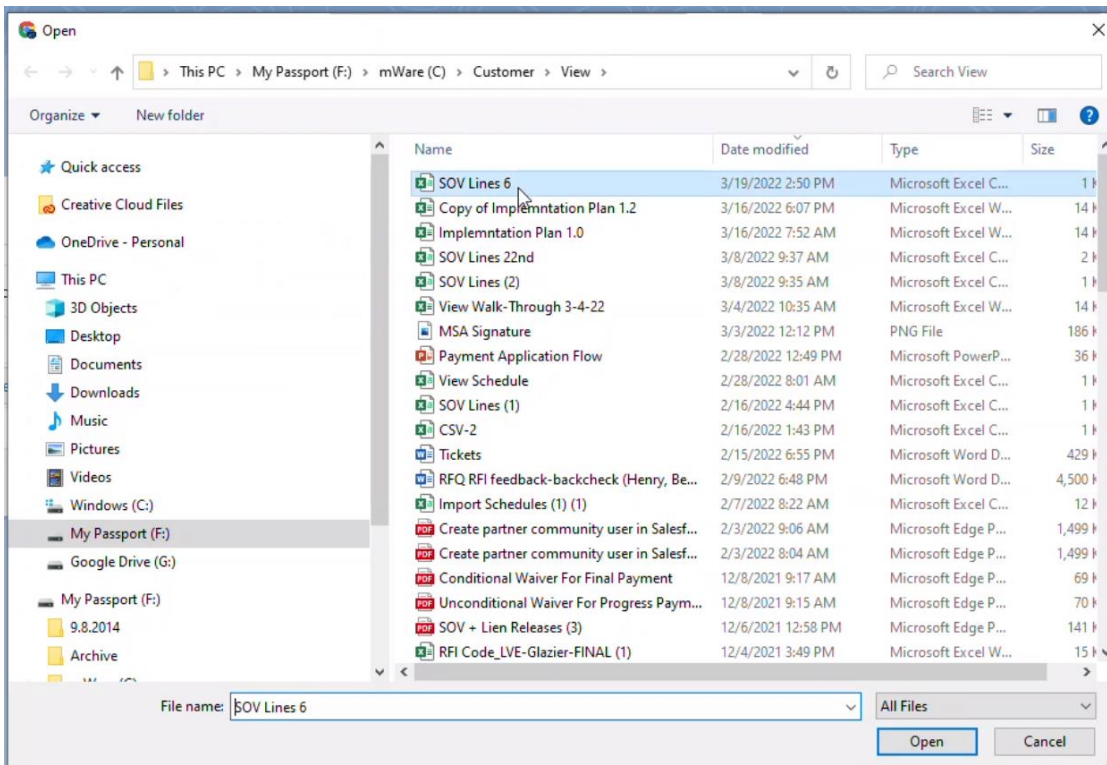
9. Locate an SOV file and click **Open**.

    You return to the Import SOVs dialog.
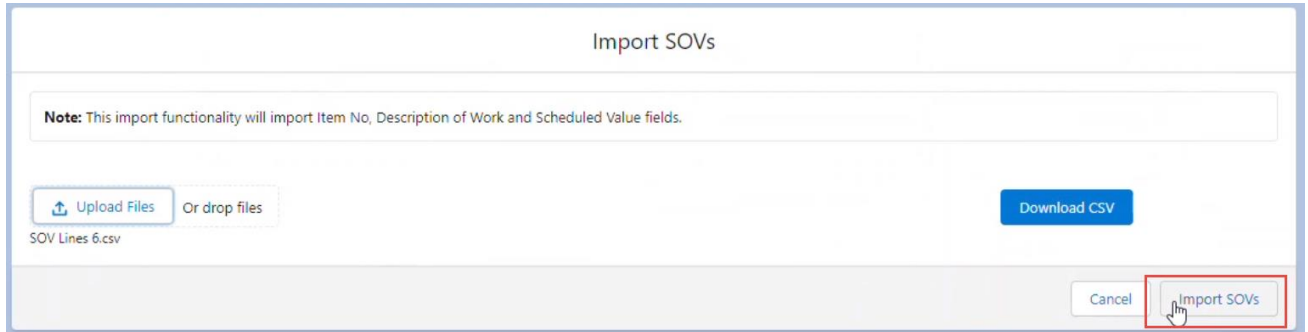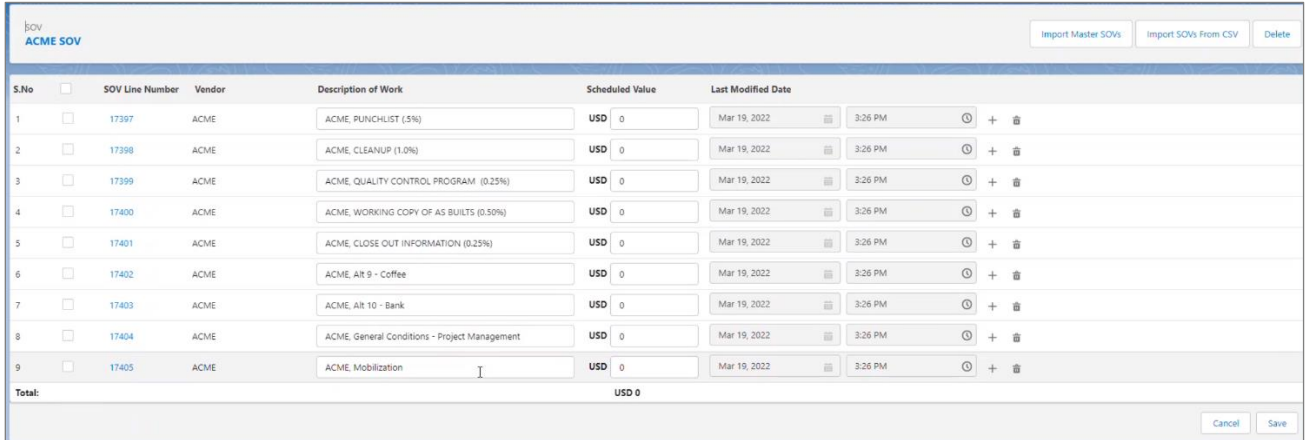
10. Click **Import SOVs**.

    You return to the new SOVs tab.
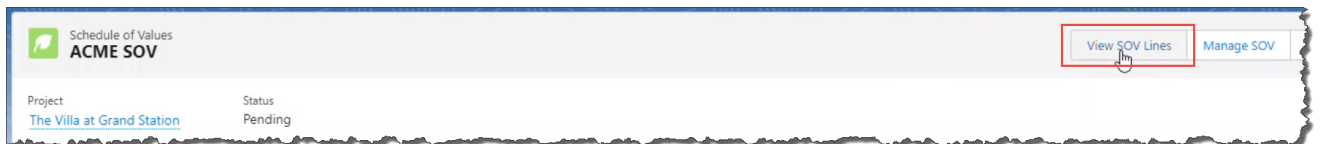
View Vendor SOV Lines

11. Click **View SOV Lines**.

These are the lines that you are asking the vendor to submit pricing for.

• If you need to add more lines, click the **+** button at the end of any row.

12. Click **Save**.

You return to the SOV window.

Check that the SOV lines have been added…

If you want to verify that the form has been signed, you can do so in the Schedule of Values Lines section:

Submit a Vendor SOV

13. Click **Company Submitted**, then **Mark as Current Status**.

This allows the vendor to see the SOV.

On the vendor's side…

The vendor can now see the new SOV:

The vendor will act on the SOV, then submit it.

When the vendor submits the SOV, it appears as Vendor Submitted:
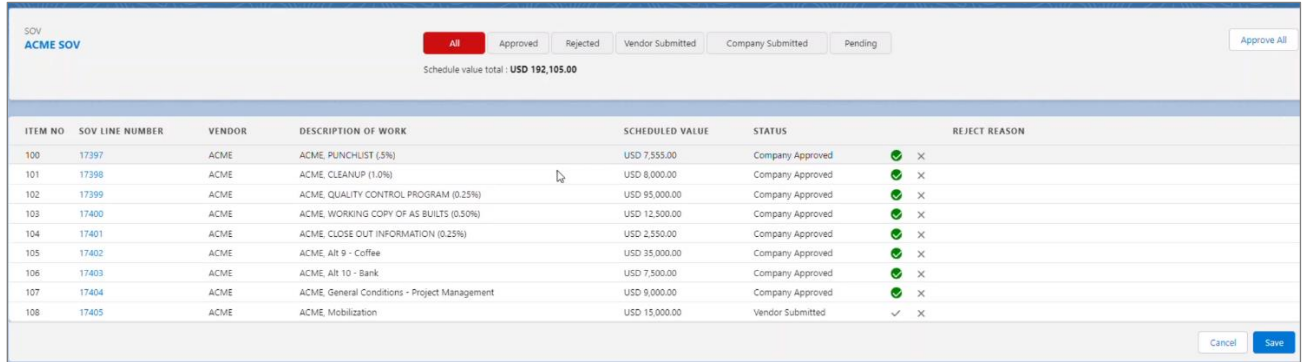
Approve a Vendor SOV

14. Click **Manage SOV**.

15. Approve each line and click **Save**.
    - You may reject one or more lines and require the vendor to re-submit them. To approve the SOV in its entirety, each line must be approved.
    - Once approved, the values here are the dollar amounts used in a request for payment at the end of the project.

    The SOV status changes to Company Approved:
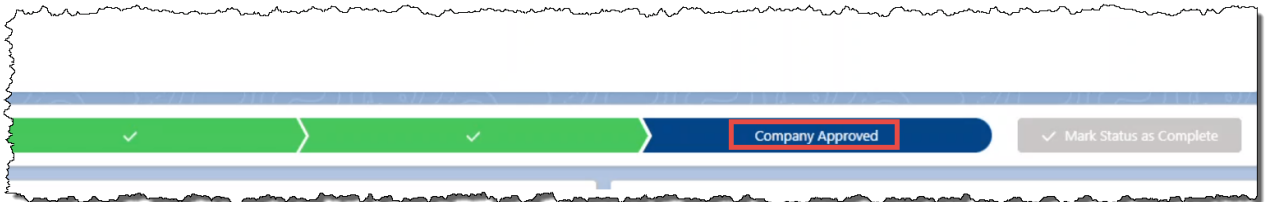
Standard SOV

Create a Standard SOV

1. Open a project.
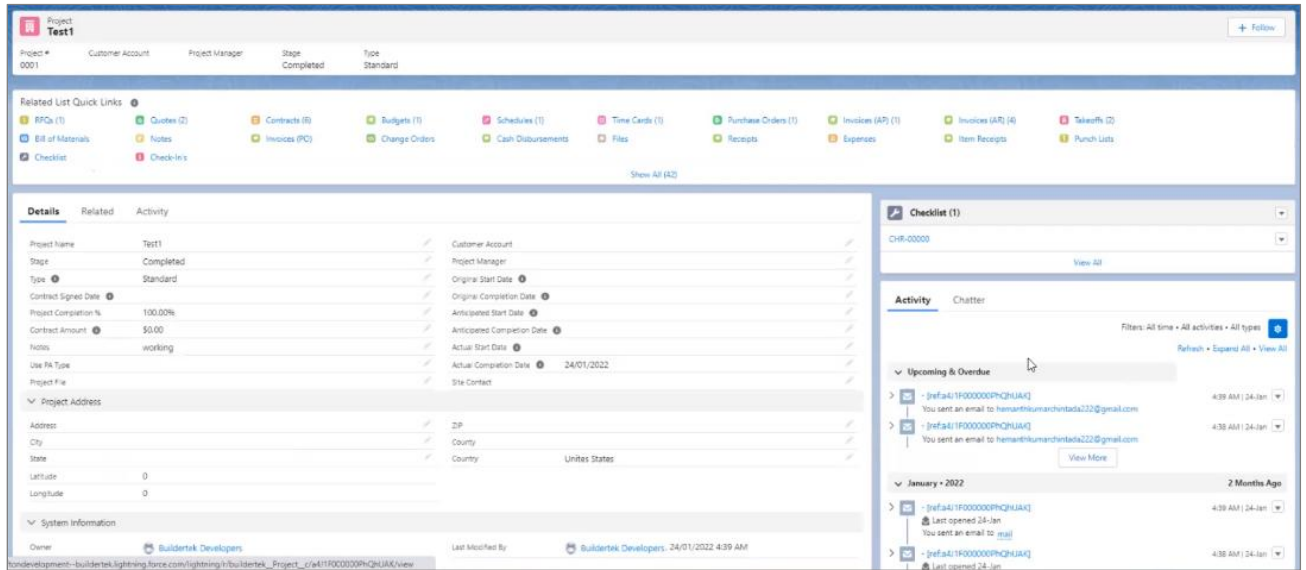
2. Click the **Schedule of Values** icon in *Quick Links*.
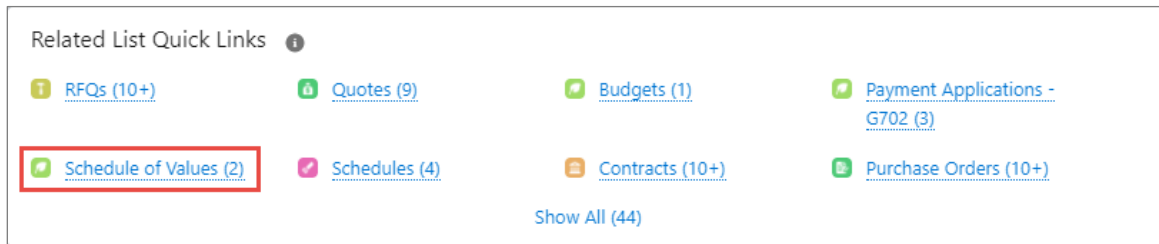
The RFQ window opens.

3. Click **New**.
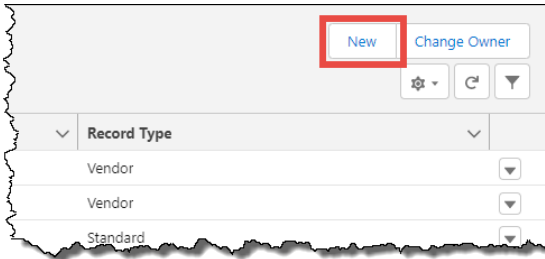
The New Schedule of Values window opens:
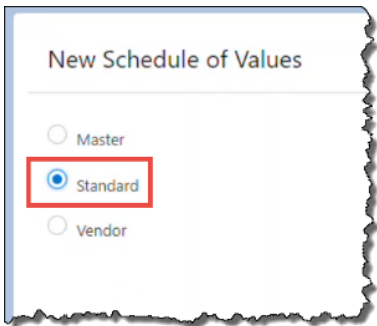
4. Select the **Standard** option, then click **Next**.
   - **Master**—select this option to create an SOV template.
   - **Standard**—select this option to create a Standard SOV that includes all costs (including vendor costs).
   - **Vendor**—select this option to create a Vendor SOV.
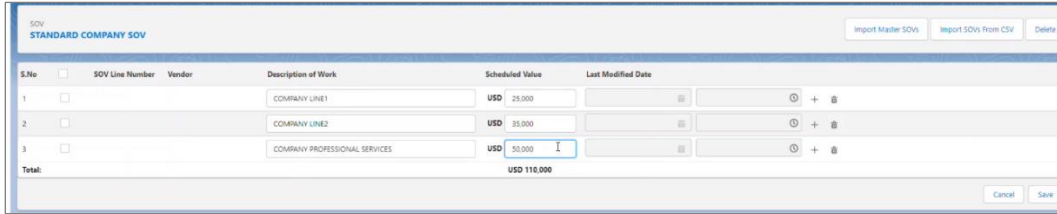
The Information window opens:
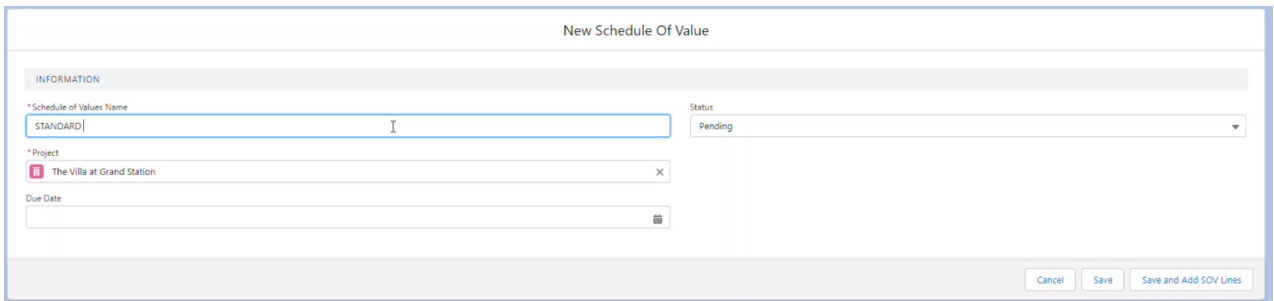
5. Click **Save and Add SOV Lines**.

6. Add SOV lines.

7. Click **Save**.

Import a Vendor SOV into a Standard SOV

8. Click **Import a Vendor SOV**.
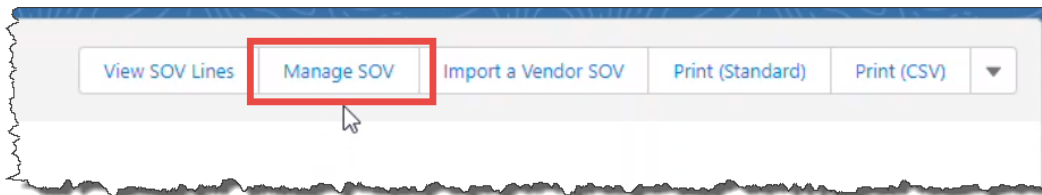
The *Schedule of Values* dialog opens:
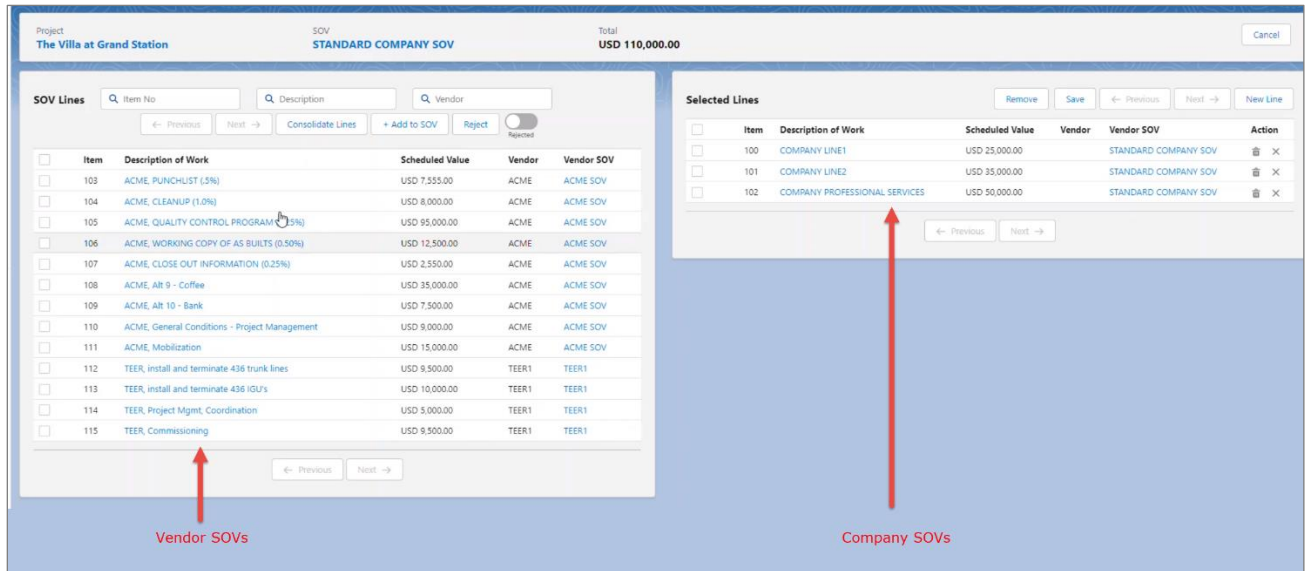
9. Select the desired vendor SOV(s), then click **Import SOV Lines**.

10. Click **Manage SOV**.

The *Manage SOV* window opens:

11. Select SOV lines, then click **Add to SOV**.

They appear in the *Selected Lines* column:

- You can add, remove, or create lines.

12. Click **Save**.

Check that the SOV lines have been added…

If you want to verify that the SOV lines have been added, check in the Schedule of Values Lines section:

Email SOV to Customer

13. Click **Print (CSV)**.

   - **Print Standard** outputs in Word doc format.

The SOV opens in MS Excel.

14. Email the CSV file to your customer.

On the customer's side…

The customer may engage in negotiations with you at this point.
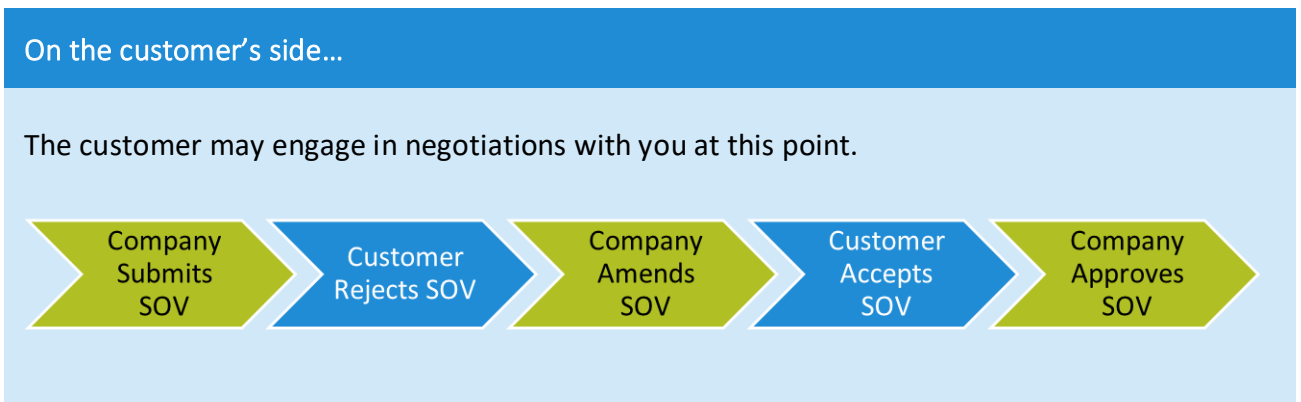
Reject or Delete an SOV Line

15. Click **Manage SOV**.

   The *Manage SOV* window opens.

16. Manage the SOV as required:
   - **Reject** an SOV line—Click the **x** button. You are prompted to enter a reason for the rejection.

   - **Delete** an SOV line—Click the 🗑 icon.
   - **Edit** an SOV Line—click the line item, enter a new value, then save.

Confirm with Vendor

> **On the vendor's side...**
>
> The vendor receives an email stating that an SOV they have submitted has been rejected.
>
> When they open the SOV, the status appears as Company Rejected:
>
>
>
> The vendor must modify and save the SOV then resubmit it.

17. Click **Manage SOV**.

18. Review and approve the resubmitted SOV line.

The SOV status changes to *Company Approved*:
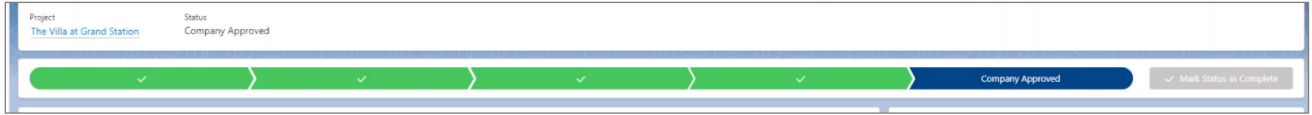

19. Review, reprint, and email out the new SOV.

On the customer's side…

The customer reviews the revised SOV.

A	B	C	D	E
Item No	SOV Line Description	heduled Amount (U	**Previously Invoiced**	
			Percent	Amount
100	COMPANY LINE1	25,000		
101	COMPANY LINE2	35,000		
102	COMPANY PROFESSIONAL SERVICES	35,000		
103	ACME, PUNCHLIST (.5%)	7,555		
104	ACME, CLEANUP (1.0%)	8,000		
106	ACME, WORKING COPY OF AS BUILTS (0.50%)	12,500		
107	ACME, CLOSE OUT INFORMATION (0.25%)	2,550		
108	ACME, Alt 9 - Coffee	000		
109	ACME, Alt 10 – Bank	7,500		
110	ACME, General Conditions - Project Management	9,000		
111	ACME, Mobilization	15,000		
112	TEER, install and terminate 436 trunk lines	9,500		
113	TEER, install and terminate 436 IGU's	10,000		
114	TEER, Project Mgmt, Coordination	5,000		
115	TEER, Commissioning	9,500		
	Total	226,105		

They will modify the value and resubmit the SOV.

The status of the SOV changes to Customer Approved.
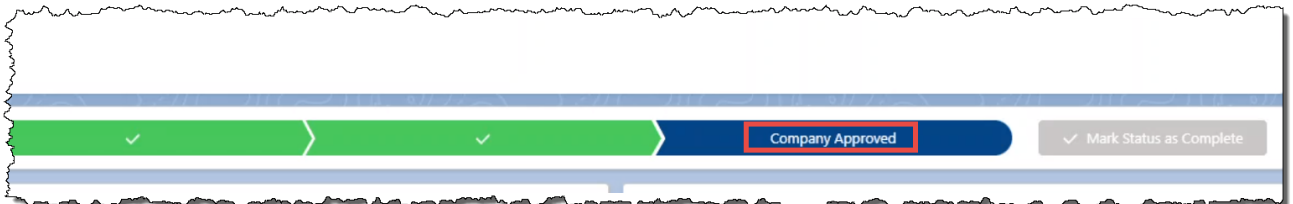
At this point, the SOV is complete.

Note: You cannot import any further information into an approved SOV.
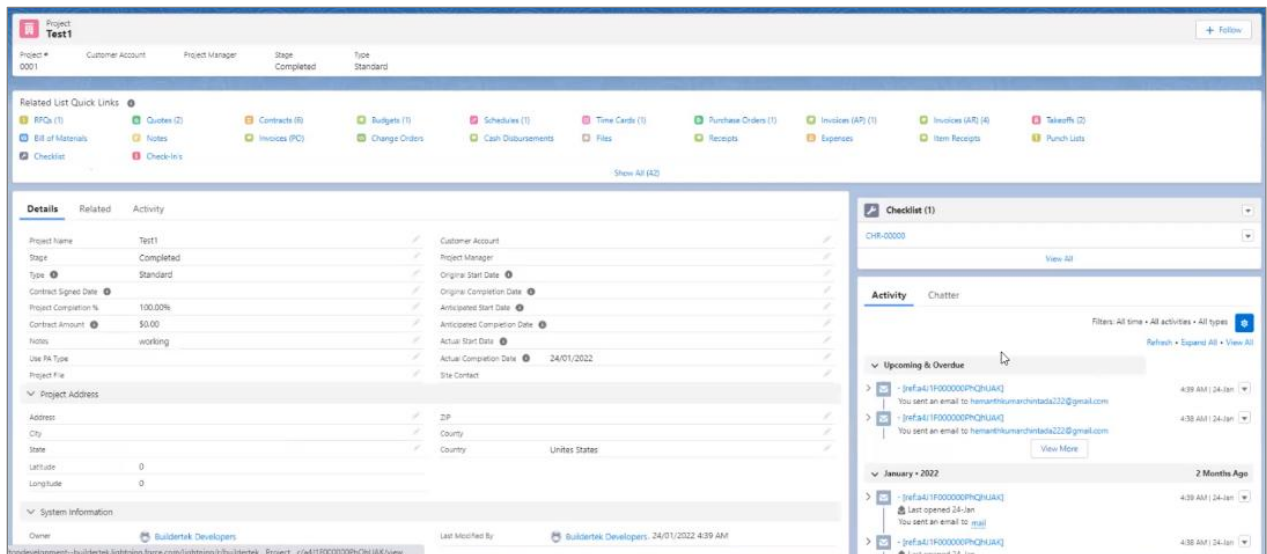
Payment Applications

The Payment Applications app is located in the **Projects** module.
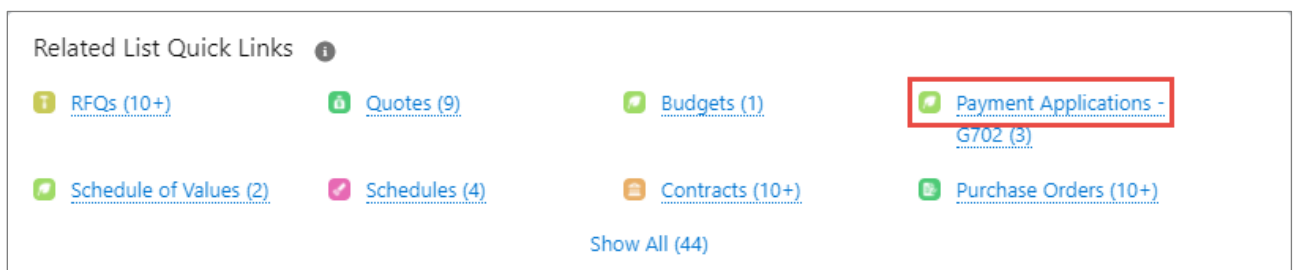
AR (Accounts Receivable) Payment App

Accounts receivable refers to money coming into your company. The AR Payments App is a module for requesting payment from your customers.
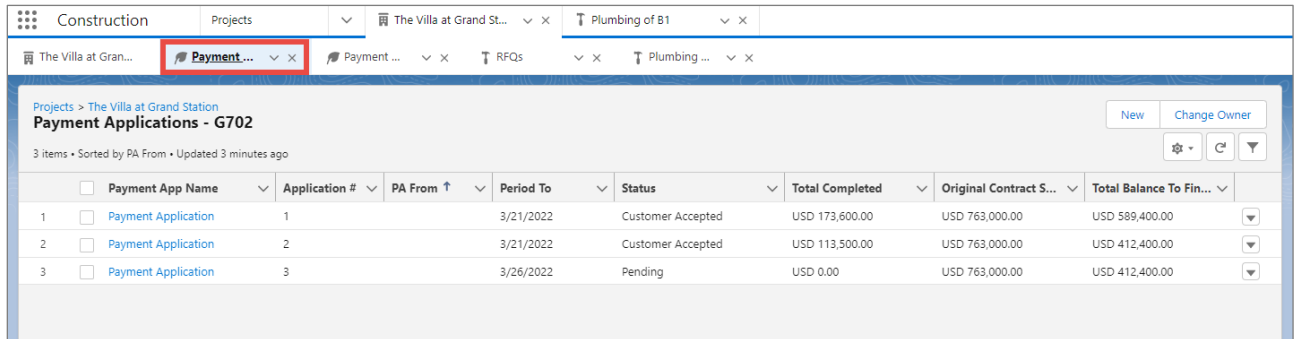
To create a new AR payment request:

1. Open a project.

2. Click the **Payment Applications** icon in the *Quick Links*.

The Payment Applications app opens in a new tab:

3. Click **New**.

   A dialog opens, allowing you to select a payment application type:


- **New Payment Application**—create a new payment application.
- **Import Company Accepted Vendor Payment Apps**—allows you to import an existing vendor payment application.
- **Import Company Approved / Import Customer Approved SOVs**—allows you to select and import an existing payment application that has been previously approved by the customer and/or your company.

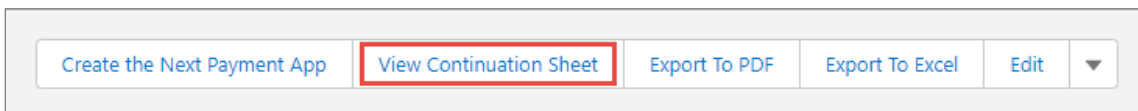4. Select an option, then click **Next**.
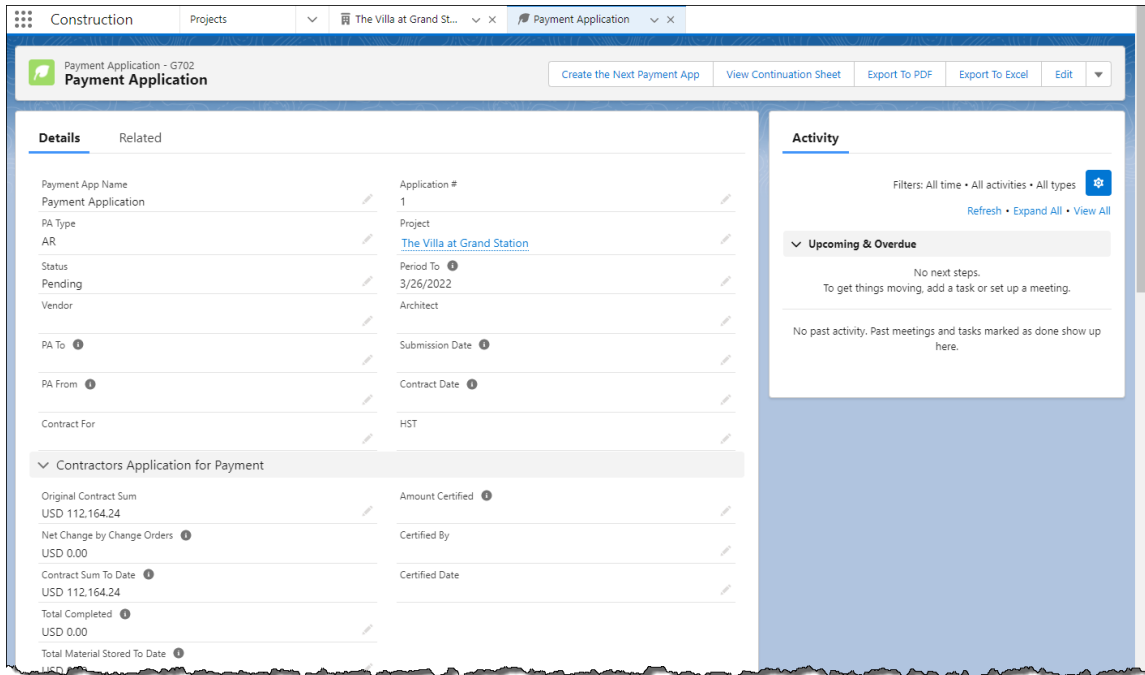
Create the Next Payment App

5. Click **Create the Next Payment App**.
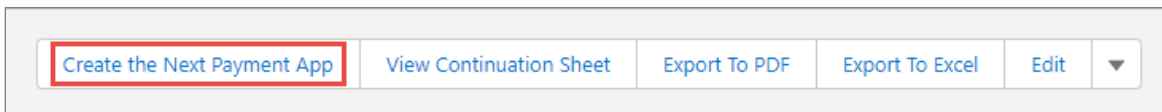
View the Continuation Sheet

6. Click **View Continuation Sheet**.

AP (Accounts Payable) Payment App

Accounts payable (AP) refers to money your company needs to pay to vendors or suppliers. The AP Payments App is a module for requesting payment from your customers.
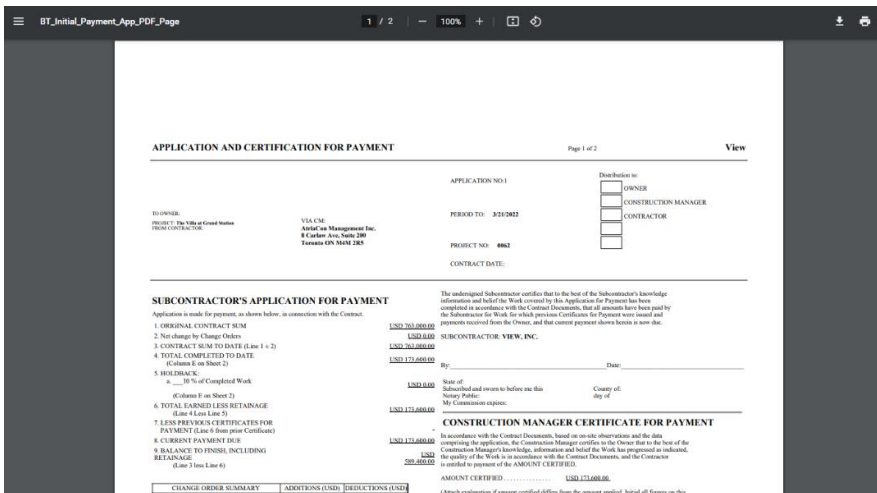
Create a New AP Payment Request

1. Open a project.

Export a Payment Application

You can export the payment application in the following formats:

- **PDF**—click **Export to PDF**. The payment application opens immediately as a PDF in a new tab:

- **Excel**—click **Export to Excel**. A dialog box opens, allowing you to save the file, then open it in Excel: