

Buildertrend workflow

Leads to Jobs checklist

New opportunity > **Lead opportunity**

Enter in any new leads that come in for the company and record them. Record **whom** you could be working with and **what** kind of work you could be doing. Everything is stored in one place.

Engagement and notes > **Record activities**

Activities allow you to record past and prepare for future interactions with your potential client. All information can be found on the lead specifically or within the Activity Calendar and List.

New information > **Lead files**

If your lead sends documents, you take pictures or have other information, store them all together on the lead opportunity.

Quote and sign > **Proposals**

Within the lead, estimate the project and create a professional-looking contract at the same time.

Win lead > **Convert to job**

When your client signs the proposal, convert the entire lead to a job. This allows you to move all information over to start your job, saving time and effort.

End of the day

Project manager wrap up

Did the schedule change? > **Update Schedule**

The schedule is made to be changed as well as keep things moving for you. Record those changes and keep everyone up to date.

What happened today? > **Daily Logs**

Create a record of what happened on your jobsite visit.

What do I need to complete? > **To-Do's**

Use To-Do's to help you assign tasks of what you still need to complete for the job.

Do I have any information for this job? > **Photo, Video and Document Storage**

Load your information into the job into the correct folders.

Buildertrend daily overview

Office manager

What is going on today > [Summary Screen](#)

Set up your Summary Screen for optimal workflow to have a high level view of each job.

Are job tasks being completed? > [To-Do's](#)

Use To-Do's to assign upcoming tasks and mark complete tasks that are due. Review past due To-Do's and comment on tasks to remind assigned users to complete.

Is communication getting answered? > [Messaging](#)

Monitor messaging features; comments and messages. Be sure to check on correspondence that is outstanding.

Is the individual job schedule progressing? > [Schedule](#)

Review job schedule to keep up to date with the progress of work.

How are the jobs progressing? > [Daily Logs](#)

Check in on the Daily Logs submitted by the field crew team to see if there is anything you need to follow up on to keep the job moving forward.

End of the day

Field crew wrap up

What happened today? > **Daily Logs**

Create a record of what happened on your jobsite visit.

What do I need to complete? > **To-Do's**

Use To-Do's to help you assign tasks of what you still need to complete for the job.

Do I have any information for this job? > **Photo, Video and Document Storage**

Load your information for the job into the correct folders.

Did I clock in and out today? > **Time Clock**

Use Time Clock to easily track your working hours.