



BI WebPortal 2018

Feature Overview

User Management

An essential part of a successful collaboration portal is the secure access by both internal (employees) and external (vendors & customers) without placing undue burden on the builder to manage all the user changes. For example, when a vendor hires a new person or when a custom forgets their password.

A robust User Management system has been created to enable different levels of access, easily address changes, self-manage user log in credentials, **“remember me” for return visits while still providing the builder with complete control to user access.** This user management system that allows for the definition of USER GROUPS enabling the BI WebPortal to address all the known user classifications of today, while providing future granular access settings for future enhancements.

Document Management

The document management system begins with a portal focused on job related documents. Providing secure access to internal / external users, allowing for search, publish and expire settings, audits of documents accessed, drag and drop document management, simple folder logic and document TAGS. This system will expand with future releases to include the management of vendor invoices, lien waivers, insurance certificates and other critical document management requirements.

Construction Schedules & Purchase Orders

A key feature of the BI WebPortal provides job superintendents and vendors access to view and update purchase orders and construction schedules. The access levels and screen views are dependent on the USER GROUP, so the details are presented based on the user log in type. Some of the general features are listed below;

- Combined List – showing construction scheduled tasks and their associated purchase orders side by side.
- Color coding based on Schedule Status and Purchase Order Status
- Color Coding highlights the last row a user changed
- Update the schedule task and/or the purchase order
- Color coding reports warning when both are not updated
- Update View – a simplified view of the most used fields
- More Details – one click drills down into more details
- Calendar View - Show job schedules based on a Day-Week-Month view
- Drill down from calendar into the schedule task and purchase order details



Builder Incubator
BI WebPortal 2018 **What's New**

Configuration, Search and Set Filters

To make the BI WebPortal most useful to the end user it was important to allow users to access and view details based on how they do their research and updates. Therefore, we provided some user level default settings, as well as default overrides to allow for broader searches.

Additionally, we wanted new users to become productive quickly, so we also established builder level defaults that can limit and/or preset the user level defaults.

Job Navigation

Locating a job via Google Maps is now 1 click. The builder can establish the job location by street address, and if addresses are not yet defined a Longitude and Latitude values can be added to enable mapping and navigation to the job site.

Announcements

Periodically a builder will need to make announcements to different groups of users. These might be announcements regarding a new community or project, there might be policy changes that need to be communicated to vendors or an internal announcement just for employees. Announcements are HTML based and can include images and formatting for professional presentations, as well as published start dates and end dates.

Email and Text Marketing Campaigns and Customer Updates

Automated email campaigns for new prospects that visit your website, standardized email communication with existing customers to update them as their house is under construction, has been a consistently requested feature. The BI WebPortal provides a very sophisticated email and text campaign system on par with all the 3rd party email systems, while maintaining an integration to PSClient.

Road Map for future updates

The final section of the BI WebPortal ***What's New for version 2018*** includes a roadmap for future development plans. We have included some, but not all of the planned features coming soon.

General

Responsive design the user interface will auto adjust to the user's screen size.

Device and OS Agnostic – a browser-based log in will work for iPhone, Android, Windows OS, MAC OS.

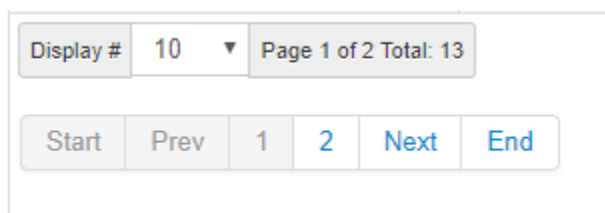


Screen Display settings

Zoom – browser settings allow users to zoom in/out

Print – browser allows printing of the displayed screen

User can set the number of records displayed per page



Builder Branding

The entire BI WebPortal is designed to allow for HTML / CSS styling. This enables **us to match a builder's** brand from their existing website and provide a seamless feel for prospects and customers.

Log In Features

Remember Me

Log in

[Forgot your username?](#)

[Forgot your password?](#)

User names are email addresses

Passwords are set with minimum character length / type to insure a consistently secure environment.

Remember Me allows frequent users to enable their browser to remember their log in credentials.

Forgot user name

Please enter the email address associated with your User account. Your username will be emailed to the email address on file.

Email Address *

Submit

Forgot password

Please enter the email address for your account. A verification code will be sent to you. Once you have received the verification code, you will be able to choose a new password for your account.

Email Address *

Submit

User Management

User Groups – The BI WebPortal has a user group structure to allow granular settings based on a **builder's company structure and how they wish to interact with both vendors and customers. A specific user can be associated with one or more User Groups and additional user groups can be established if necessary for future enhancements. Here are the primary User Groups;**

Builder Employee

- Employee Admin
- Employee Superintendent
- Employee Marketing
- Employee Sales-Designer
- Employee Office
- Employee Project Manager

Builder Vendors

- Vendor Admin
- Vendor Accounting
- Vendor Doc Maintenance
- Vendor Purchase Orders
- Vendor Scheduling
- Vendor HO Walk
- Vendor Punch Out
- Vendor Warranty

Builder Customers and Realtors

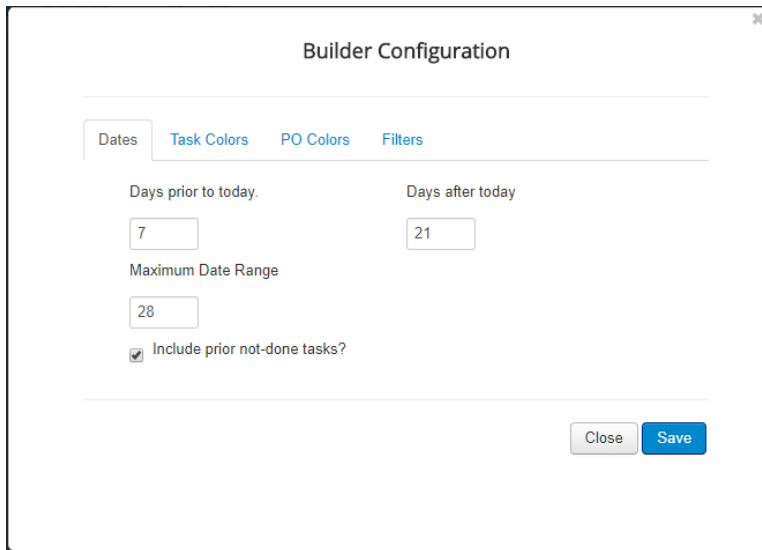
- Prospect (Registered)
- Customer Sold
- Customer Delivered
- Realtor

Default Configuration Settings

The BI WebPortal has a Builder Configuration setting that allows the builder to configure the way certain information will be displayed, providing a consistent user interface and reducing the technical requirements of vendors and other users. For example, setting the colors for Purchase Order STATUS and Schedule Task STATUS should be the same company wide. This way if a vendor sees a GREEN task and a Superintendent sees a GREEN task – they both know the status = DONE.

Additionally, defaults are defined regarding schedule task dates to insure when the vendor or superintendent request a list of TASKS the resulting data is filtered to the most appropriate list of records. These defaults make the user interface much easier and faster, while still providing a deeper search capability when required.

Builder Configuration Settings

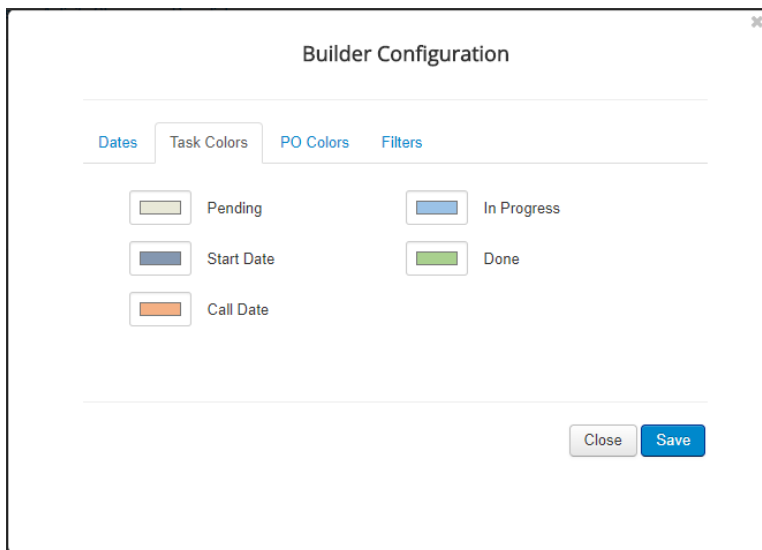


The screenshot shows the 'Builder Configuration' dialog box with the 'Dates' tab selected. It contains the following fields and options:

- Dates** (selected tab), **Task Colors**, **PO Colors**, **Filters**
- Days prior to today:** Input field with value 7
- Days after today:** Input field with value 21
- Maximum Date Range:** Input field with value 28
- Include prior not-done tasks?**
- Close** and **Save** buttons

When requesting Schedule Tasks the system knows TODAY'S date and will automatically retrieve the following;

- All TASKS 7 days prior to today (including DONE tasks)
- All TASKS 21 days into the future
- ALL past due tasks (tasks not marked as DONE)



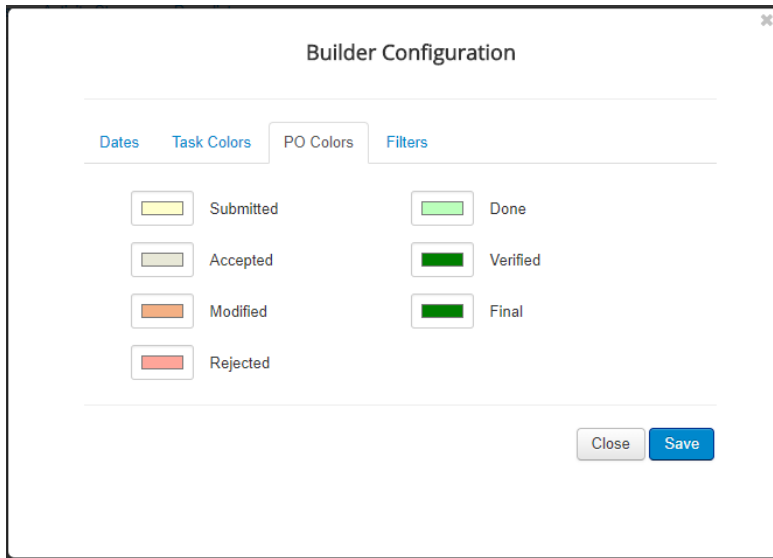
The screenshot shows the 'Builder Configuration' dialog box with the 'Task Colors' tab selected. It displays color swatches for task statuses:

- Pending** (light green swatch)
- In Progress** (blue swatch)
- Start Date** (dark blue swatch)
- Done** (green swatch)
- Call Date** (orange swatch)

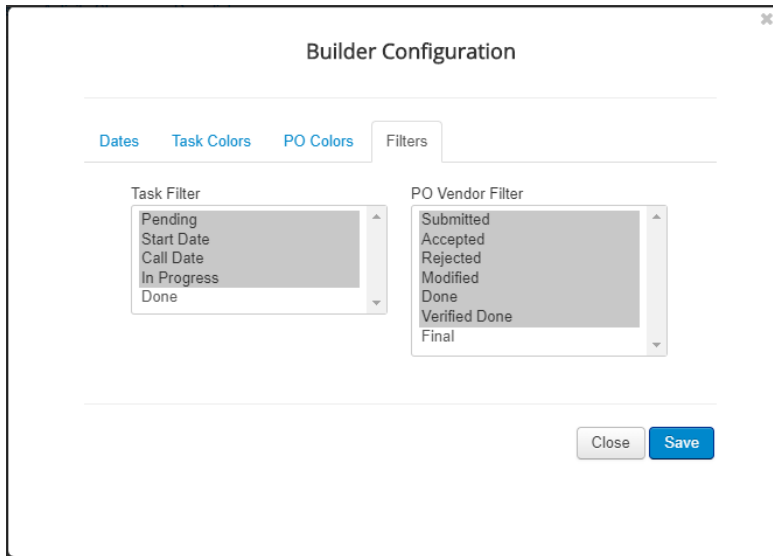
At the bottom, there are **Close** and **Save** buttons.

Default Colors for Construction Schedule Task STATUS. When a task is updated the row will change to the Task Color.


BI WebPortal 2018 What's New



Default Colors for Purchase Order Vendor STATUS. When a PO is updated the row will change to the Task Color.



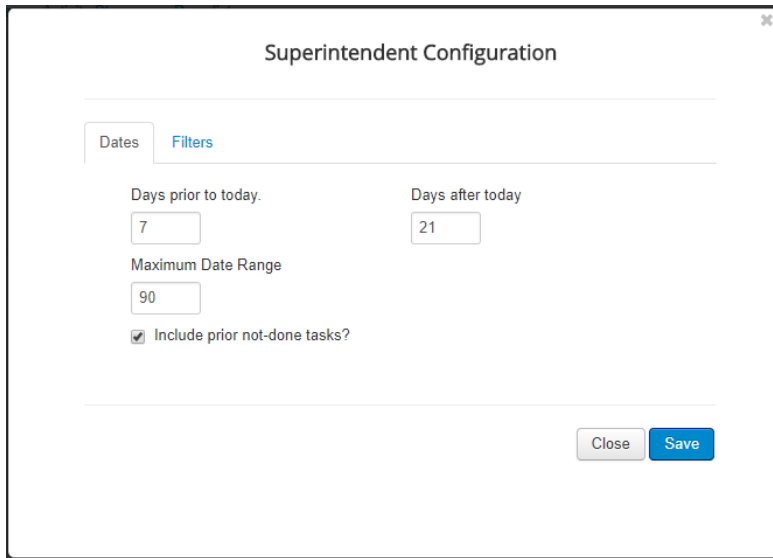
Task Filter indicates which Construction Schedule Tasks to include when a task list is requested. This setting will include all tasks except those with a status = DONE.

PO Vendor Filter indicates which Purchase Orders to include when a PO list is requested. This setting will include all **PO's** except those with a status = FINAL.

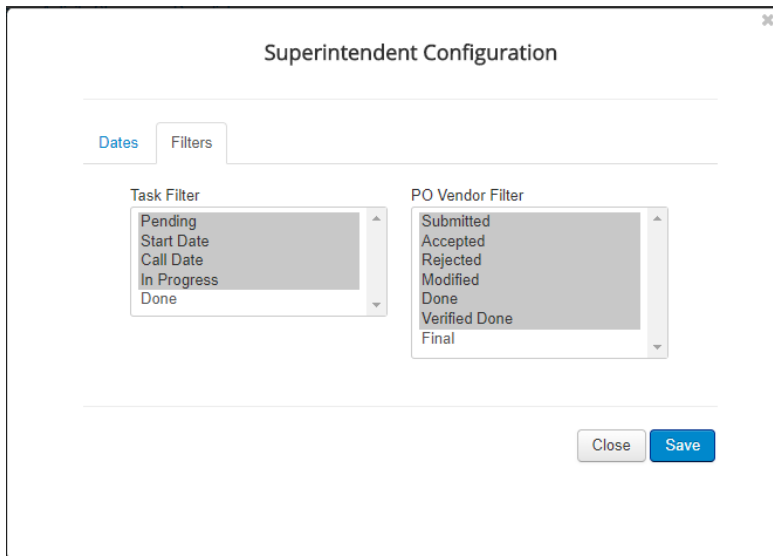

BI WebPortal 2018 **What's New**

We have also allowed the SUPERINTENDT User to establish their personal defaults regarding data ranges for Schedule Tasks. These settings will override the Builder configuration and allow the superintendent to establish their own defaults for DATES and FILTERS.

Superintendent Configuration Settings



The screenshot shows a dialog box titled "Superintendent Configuration" with a close button in the top right corner. It has two tabs: "Dates" (selected) and "Filters". Under the "Dates" tab, there are three input fields: "Days prior to today" with the value "7", "Days after today" with the value "21", and "Maximum Date Range" with the value "90". Below these fields is a checked checkbox labeled "Include prior not-done tasks?". At the bottom right, there are "Close" and "Save" buttons.



The screenshot shows the same "Superintendent Configuration" dialog box, but with the "Filters" tab selected. It features two dropdown menus: "Task Filter" and "PO Vendor Filter". The "Task Filter" dropdown lists: Pending, Start Date, Call Date, In Progress, and Done. The "PO Vendor Filter" dropdown lists: Submitted, Accepted, Rejected, Modified, Done, Verified Done, and Final. At the bottom right, there are "Close" and "Save" buttons.

Document Maintenance-Backend

Categories

The screenshot shows the 'Categories' management interface. On the left sidebar, 'Categories' is selected. The main area features a table with columns for 'Status', 'Owner', 'Group', and 'Access'. The categories listed are 'Job Files', 'Closing', 'Construction', 'Customer', 'Vendors', and 'Approved Contracts'. Each category has a checkbox and a menu icon. Above the table are buttons for '+ New', 'Delete', 'Publish', and 'Unpublish'. Below the table are filters for 'Status', 'Owner', 'Group', and 'Access'.

Create CATEGORIES (folders) to hold specific types of documents. Folder Categories can also be used for access levels. In the example provided – user group access could be defined as follows;

Employee Office

- All Categories

Employee Superintendent

- Construction
- Vendors

Vendor Doc Maintenance

- Vendors

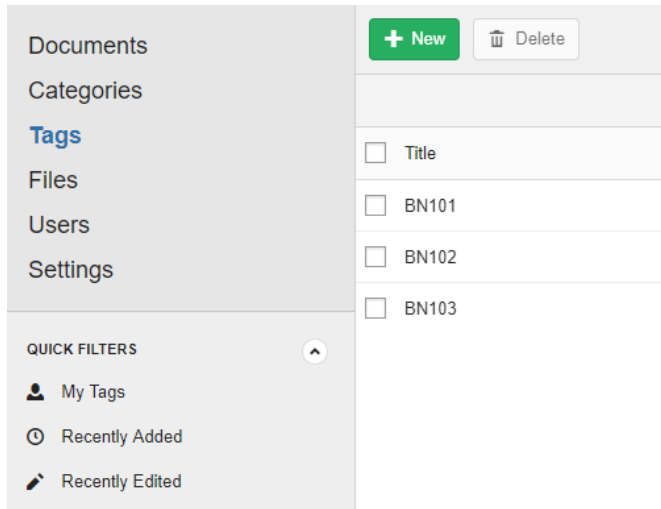
Customer Sold

- Customer – but also locked to document ownership and restricted to view only their documents

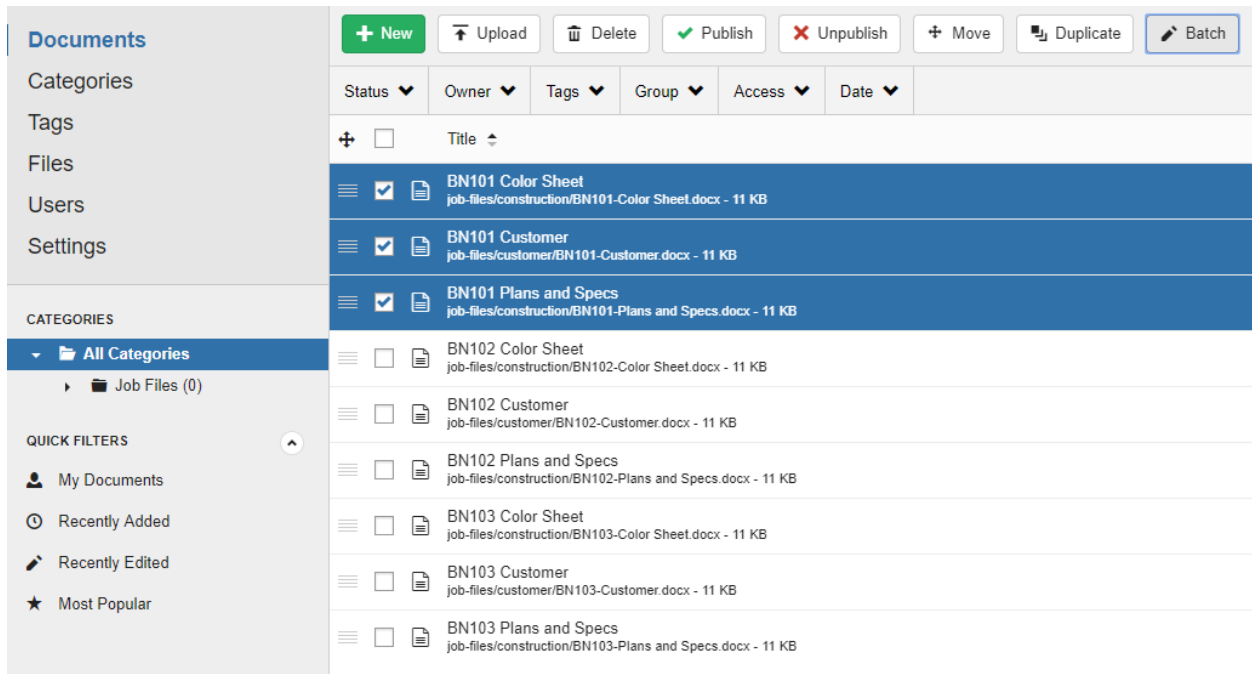

 BI WebPortal 2018 What's New

Tags and Document Names

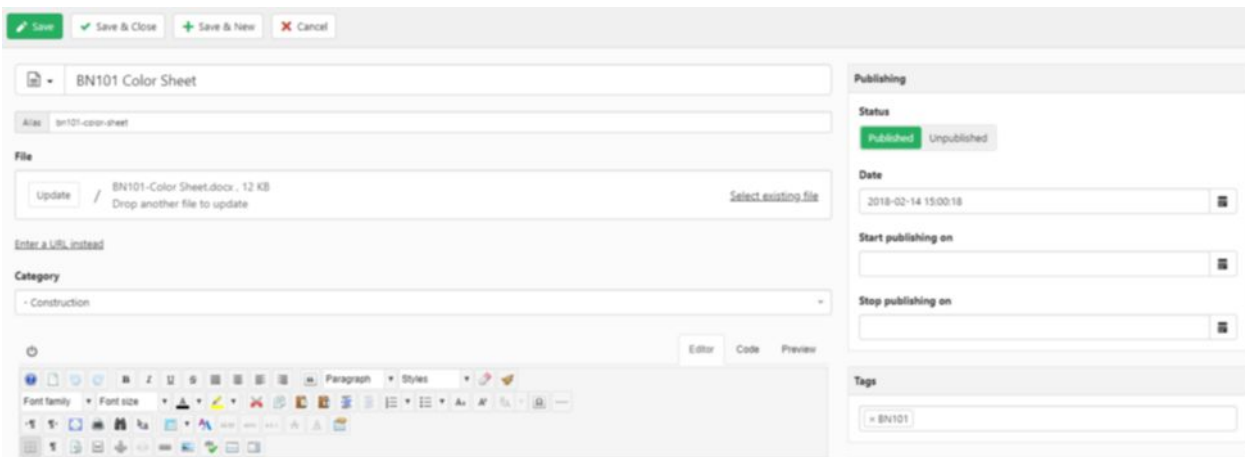
While a document naming convention is important, the use of TAGS is available to assign job numbers to individual documents. This enables quick search features.



TAGS can be added at the upload of a document, or documents can be BATCHED processed, by selecting from a filtered and sortable list, MARK and then assign a TAG.



Specific Document settings



The screenshot shows the document settings interface for a document titled "BN101 Color Sheet". At the top, there are four buttons: "Save", "Save & Close", "Save & New", and "Cancel". Below this, the document title "BN101 Color Sheet" is displayed in a text box, with an alias "bn101-color-sheet" shown below it. The "File" section includes an "Update" button, a file name "BN101-Color Sheet.docx, 12 KB", and a "Select existing file" button. Below the file section, there is a "Category" dropdown menu set to "Construction". At the bottom of the main content area, there are "Editor", "Code", and "Preview" tabs, and a rich text editor toolbar. On the right side, the "Publishing" section shows the status as "Published" (with a green checkmark) and "Unpublished". It also includes fields for "Date" (2018-02-14 15:00:18), "Start publishing on", and "Stop publishing on". At the bottom right, the "Tags" section shows a tag "BN101".

Here are some of the document level settings

- Published
- Unpublished
- Start Publishing
- Stop Publishing
- TAGS
- Permission access (Category, Groups, Presets)
- Document Ownership
- Attach an image
- Audits (downloaded – by who and when)
- Document name
- Document description
- NEW icon – when documents are new (or changed) we can display a NEW icon for a system defined number of days (for example -

Uploading Documents

/ Drop files here

Select default values

<p>Category:</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Job Files</div>	<p>Owner:</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">CCP User</div>
<p>Tags</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<p>Clean up titles</p> <div style="display: flex; gap: 5px;"> <input checked="" type="button" value="Yes"/> <input type="button" value="No"/> </div>

(document-2013-07-08.pdf = Document 2013 07 08)

Preview

Upload some files first

Drag and Drop a selection of files and assign TAGS and CATEGORY all at once

/ **Uploaded 4 files** [show queue](#)
 Drop more files here

Select default values

<p>Category:</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Job Files</div>	<p>Owner:</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">CCP User</div>
<p>Tags</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<p>Clean up titles</p> <div style="display: flex; gap: 5px;"> <input checked="" type="button" value="Yes"/> <input type="button" value="No"/> </div>

(document-2013-07-08.pdf = Document 2013 07 08)

Preview

<input type="checkbox"/>	File name: BN101-Plans and Specs.docx	Title: BN101 Plans and Specs
<input type="checkbox"/>	File name: BN101-Selections Addendum.docx	Title: BN101 Selections Addendum
<input type="checkbox"/>	File name: BN101-Color Sheet.docx	Title: BN101 Color Sheet
<input type="checkbox"/>	File name: BN101-Customer.docx	Title: BN101 Customer

Superintendent Log In

Job List

Job Number	Job Description	Job Address	Project	
VYR00001	VYR LOT 1 - RICHMOND A	705 VINEYARD RESERVE CT	Vineyard Reserve	⋮ 🔍
VYR00004	VYR LOT 4 - RICHMOND A	711 VINEYARD RESERVE CT	Vineyard Reserve	⋮ 🔍
VYR00005	VYR LOT 5 - MOO WESTIN B	713 VINEYARD RESERVE CT	Vineyard Reserve	⋮ 🔍
VYR00006	VYR LOT 6 - CASA KEY II A	715 VINEYARD RESERVE CT	Vineyard Reserve	⋮ 🔍
VYR00007	VYR LOT 7 - PARKER A	717 VINEYARD RESERVE CT	Vineyard Reserve	⋮ 🔍
VYR00012	VYR LOT 12 - PARKER A	1429 W 12th Street	Vineyard Reserve	⋮ 🔍
VYR00014	VYR LOT 14 - SHELBY A	731 VINEYARD RESERVE CT	Vineyard Reserve	⋮ 🔍
VYR00015	VYR LOT 15 - WESTIN B	733 VINEYARD RESERVE CT	Vineyard Reserve	⋮ 🔍
VYR00020	VYR LOT 20 - Parker A	718 VINEYARD RESERVE CT	Vineyard Reserve	⋮ 🔍
VYR00021	VYR LOT 21 -Serena A	714 VINEYARD RESERVE CT	Vineyard Reserve	⋮ 🔍

Display # 10 Page 1 of 2 Total: 13

Start Prev 1 2 Next End

One Click displays a job list

- All active jobs that are assigned to this superintendent.
- Jobs are sorted by Job Number
- Job Description, Job Address and Project are also displayed
- Buttons to the far right
 - Combined List for the selected job (shows POs and Schedule)
 - Navigate to the Job (using Google Maps)
 - New button (Docs) will be added

Gemini side

- The superintendent is assigned to the job in Gemini.
- This is also a global feature to allow for mass reassignment of jobs to a different superintendent
- Single check box in Gemini job list controls visibility of a job in the web portal

Superintendent Log In

Combined List - Schedules and Purchase Orders (1)

Displays the Construction Schedule Task and the Purchase Order side by side.

Scheduled Tasks and POs

Job: VYR00004 | 711 VINEYARD RESERVE CT | VYR LOT 4 - RICHMOND A Filter: 02/04/2018 - 03/04/2018 | PSC | SARMDV

Description	Start Date	End Date	Vendor	Task Number	Status	Package	Total Amount	Document	Vendor	Status
Lintel Inspection	07/31/17	07/28/17	3PI THIRD PARTY INSPECTIONS, LLC	A4900	Pending				No PO found for this task	
Outside Cleanup-Block	07/31/17	07/31/17	SUAREZ GRADING ENTERPRISES INC.	A5200	Pending	Outside Cleanup 1-Block Clean	308.00	VYR00004-32020	SUAREZ GRADING ENTERPRISES INC.	S
Rough Grade - "Stucco Grade"	07/31/17	07/31/17	SUAREZ GRADING ENTERPRISES INC.	A5300	Pending				No PO found for this task	
Frame Pack Delivery	08/01/17	08/01/17	84 LUMBER COMPANY, LP	A5400	Pending	Deliver Framing Material	3293.15	VYR00004-09030	84 LUMBER COMPANY, LP	S
Truss Prep, Set & Decking	08/01/17	08/03/17	D. WATKINS, LLC	A5500	In Progress				No PO found for this task	
Deck Nailing Inspection	08/04/17	08/04/17	3PI THIRD PARTY INSPECTIONS, LLC	A5800	Pending				No PO found for this task	
FRAMING	08/04/17	08/07/17	D. WATKINS, LLC	A6000	Pending	Install Framing	5215.50	VYR00004-09020	D. WATKINS, LLC	S
Install Windows	08/04/17	08/04/17	MANNING BUILDING SUPPLIES	A6100	Pending	Deliver and Install Windows	2410.11	VYR00004-10010	MANNING BUILDING SUPPLIES	S
Deliver Exterior Doors	08/04/17	08/04/17	MANNING BUILDING SUPPLIES	A6200	Pending	Deliver Exterior Doors	205.08	VYR00004-19000	MANNING BUILDING SUPPLIES	S
Wall Sheathing Inspection	08/07/17	08/07/17	3PI THIRD PARTY INSPECTIONS, LLC	A6300	Pending				No PO found for this task	

Job: VYR00004 | 711 VINEYARD RESERVE CT | VYR LOT 4 - RICHMOND A

Description	Start Date	End Date	Vendor
-------------	------------	----------	--------

Job number, address and description displayed at the top left

Filter: 02/04/2018 - 03/04/2018 | PSC | SARMDV

Task Number	Status	Package	Total Amount
A1100	Pending		

Filter settings displayed

Document	Vendor	Status
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Calculate will update the schedule completion dates of related tasks based on user input
 Open Calendar – opens the schedule in a Month-Week-Day view
 Set Filter – allows the user to search beyond the default settings

Superintendent Log In

Combined List - Schedules and Purchase Orders (2)

Scheduled Tasks and POs

Job: VYR00004 | 711 VINEYARD RESERVE CT | VYR LOT 4 - RICHMOND A Filter: 02/04/2018 - 03/04/2018 | PSC | SARMDV Calculate Open Calendar Set Filter

Description	Start Date	End Date	Vendor	Task Number	Status	Package	Total Amount	Document	Vendor	Status
Lintel Inspection	07/31/17	07/28/17	3PI THIRD PARTY INSPECTIONS, LLC	A4900	Pending				No PO found for this task	
Outside Cleanup-Block	07/31/17	07/31/17	SUAREZ GRADING ENTERPRISES INC.	A5200	Pending	Outside Cleanup 1-Block Clean	308.00	VYR00004-32020	SUAREZ GRADING ENTERPRISES INC.	S
Rough Grade - "Stucco Grade"	07/31/17	07/31/17	SUAREZ GRADING ENTERPRISES INC.	A5300	Pending				No PO found for this task	
Frame Pack Delivery	08/01/17	08/01/17	84 LUMBER COMPANY, LP	A5400	Pending	Deliver Framing Material	3293.15	VYR00004-09030	84 LUMBER COMPANY, LP	S
Truss Prep, Set & Decking	08/01/17	08/03/17	D. WATKINS, LLC	A5500	In Progress				No PO found for this task	

Rows are color coded based on Construction Schedule Status

Icons on the right

 Edit

 Preview and Print

Combined List - Edit

Super Tasks and Purchase Orders

Job: VYR00004 | 711 VINEYARD RESERVE CT | VYR LOT 4 - RICHMOND A

Schedule Task

Description

Outside Cleanup-Block

Start Date

07/31/17

End Date

07/31/17

Vendor

SUAREZ GRADING ENTERPRISES INC.

Task Number

A5200

Status

Pending
 Start Date
 Call Date
 In Progress
 Done

More Details

Purchase Order

Package

Outside Cleanup 1-Block Clean

Total Amount

308.00

Document

VYR00004-32020

Vendor

SUAREZ GRADING ENTERPRISES INC.

Vendor Status

Done
 Verified Done

Print Purchase Order

Open PO Details

- Update Start Date-End Date
- Update Task Status
- More Details

- Update PO Vendor Status
- Preview-Print PO
- Open PO Details


BI WebPortal 2018 **What's New**

More Details


<p>Vendor <input type="text" value="SUAREZ GRADING ENTERPRISES INC."/></p> <p>Task Number <input type="text" value="A5200"/></p> <p>Status <table border="1" style="display: inline-table;"><tr><td style="background-color: #4CAF50; color: white;">Pending</td><td>Start Date</td><td>Call Date</td><td>In Progress</td><td>Done</td></tr></table></p> <p><input type="button" value="Less Details"/></p> <p>Schedule Task Notes <div style="border: 1px solid #ccc; height: 40px;"></div></p> <p>Variance Days <input type="text" value="0"/> Reason Code <input type="text" value=""/></p> <p>Excused Days <input type="text" value="0"/></p> <p><input type="button" value="No Alert"/> <input type="button" value="Alert"/></p> <p><input type="button" value="Save"/> <input type="button" value="Cancel"/></p>	Pending	Start Date	Call Date	In Progress	Done	<p>Vendor <input type="text" value="SUAREZ GRADING ENTERPRISES INC."/></p> <p>Vendor Status <input type="button" value="Done"/> <input type="button" value="Verified Done"/></p> <p><input type="button" value="Print Purchase Order"/> <input type="button" value="Open PO Details"/></p> <p>Purchase Order Notes <div style="border: 1px solid #ccc; height: 40px;"></div></p> <p>Log Text <div style="border: 1px solid #ccc; padding: 2px;">*** 07/03/17 Printed Submitted</div></p>
Pending	Start Date	Call Date	In Progress	Done		

The MORE DETAILS button expands or contracts (LESS DETAILS) the edit screen. Additional details are displayed, such as TASK NOTES, VARIANCE DAYS, REASON CODE, EXCUSED DAYS and ALERT TASK and PURCHASE ORDER NOTES.

The MORE DETAILS features are used less often. The most frequently required fields are displayed on the initial screen, saving the user the need to scroll down.

Print Purchase Order

The Print Purchase Order button will open a previewed PO in a new tab. User can view and/or print

Document # VYR00004-32020 Date: 07/03/17 Page Number: 1 of 1																
<h3>Purchase Order</h3>																
Vendor: 6144 SUAREZ GRADING ENTERPRISES INC. PO BOX 89579 TAMPA, FL 33689	<div style="text-align: center;">  </div> Location 711 VINEYARD RESERVE CT VYR LOT 4 - RICHMOND A SEFFNER, FL 33584 Pkg: 255 - Oustside Cleanup I-Block Clean Job: VYR00004:32020 Outside Cleanup-Block															
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Qty Ordered</th> <th style="text-align: left;">Unit</th> <th style="text-align: left;">Part # / Description</th> <th style="text-align: right;">Unit Cost</th> <th style="text-align: right;">Extension</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1.00</td> <td style="text-align: center;">EA</td> <td style="text-align: left;">32.00510 Exterior Clean - Block Clean</td> <td style="text-align: right;">308.0000</td> <td style="text-align: right;">308.00</td> </tr> <tr> <td colspan="3"></td> <td style="text-align: right; border-top: 1px solid black;">Document Total:</td> <td style="text-align: right; border-top: 1px solid black;">308.00</td> </tr> </tbody> </table>		Qty Ordered	Unit	Part # / Description	Unit Cost	Extension	1.00	EA	32.00510 Exterior Clean - Block Clean	308.0000	308.00				Document Total:	308.00
Qty Ordered	Unit	Part # / Description	Unit Cost	Extension												
1.00	EA	32.00510 Exterior Clean - Block Clean	308.0000	308.00												
			Document Total:	308.00												
Subcontractor Purchase Order																
<p>Once ALL WORK IS COMPLETED please submit this P.O. via email to ap@highlandhomes.org to be processed for payment.</p> <p>Thank You for doing business with Highland Homes.</p>																

Superintendent Log In Document Search

All Documents

Documents

Search for documents

Find by title or description...

Category

- Select -

Tags

All Tags

Date start

2018-02-14

Date end

2018-02-14

Search Reset

Order by Title Alphabetical

A document search is available on the front end and is tied to the users log in. For example, User Group Employee Superintendent – would be limited to the CONSTRUCTION and VENDOR categories.

All Documents

Documents

Search for documents

Find by title or description...

Category

x - Construction x - Vendors

Tags

x BN102

Date start

2018-02-14

Date end

2018-02-14

Search Reset

Order by Title Alphabetical

BN102 Color Sheet New	14 Feb 2018
BN102 Plans and Specs New	14 Feb 2018

Superintendent Log In

Document Search

Construction

Documents

▶ Search for documents

Order by

- Title Alphabetical
- Title Alphabetical
- Title Reverse Alphabetical
- Most Recent First
- Oldest First
- Most popular first
- Last modified first

 BN102 Color Sheet **New**

 BN102 Plans and Specs **New**

25 ▼

[Back to Top](#)

Listed documents can also be sorted based on multiple ORDER BY methods
NEW documents show a NEW icon

Vendor Log In

Builder Incubator webportal

Search

HI AMERICAN STUCCO, PRECAST AND STONE, LLC.

Log out

Home Tasks Jobs Configuration All Documents Activity Stream Docs list

Welcome to the Highland Homes webportal

© 2018 Builder Incubator webportal

Back to Top

Adding Vendor Contacts

Home Tasks Jobs Configuration All Documents Activity Stream Docs list

Vendor Contacts

+ Add

Contact Name	User Name	Email	User Group
There are no users set up yet			

Display # 10

© 2018 Builder Incubator webportal

Vendor Contacts

Vendor Contacts

👁 Contact Name

👁 Email

User Group

- Vendor-Acct
- Vendor-DOC
- Vendor-Orientation
- Vendor-PO
- Vendor-Punchout
- Vendor-Sched
- Vendor-Warranty

★ Password

Confirm passw

Vendor-Construction Schedule TASK List

Home **Tasks** Jobs Configuration All Documents Activity Stream Docs list

Scheduled Tasks and POs

Filter: 02/07/2018 - 03/07/2018 | PSC | SARMDV Open Calendar Set Filter





















Description	Start Date	End Date	Task Number	Status	Package	Total Amount	Document	Information	Status
Stucco Bump Out	06/27/17	06/27/17	A15100	P	Stucco Bumpout	200.00	HM3152-10011VC		M
Apply Stucco	06/28/17	06/28/17	A10000	P	Apply Stucco	2291.52	HM3105-10010VC		M
Install Stucco Wire Lath	06/29/17	07/05/17	A5000	P				No PO found for this task	
Stucco Bump Out	06/30/17	06/30/17	A15100	P	Stucco Bumpout	200.00	HM3147-10011VC		M
Stucco Bump Out	07/06/17	07/06/17	A15100	P	Stucco Bumpout	200.00	VYR00024-10011		S
Stucco Bump Out	07/06/17	07/06/17	A15100	C	Stucco Bumpout	200.00	SCC06004-10011		FINAL
Stucco Bump Out	07/06/17	07/06/17	A15100	C	Stucco Bumpout	200.00	SCC01006-10011		FINAL
Apply Stucco	07/06/17	07/06/17	A10000	P	Apply Stucco	2291.52	HM3002-10010VC		M
Stucco Garage Returns	07/07/17	07/10/17	A8700	C				No PO found for this task	
Stucco Bump Out	07/07/17	07/07/17	A15100	I	Stucco Bumpout	200.00	BJE006-10011		M

- The Vendor is provided an additional way to view their upcoming work – by the TASK list. This is a list with predefined DEFAULTS and display a list of tasks – by date, as opposed to by job.

Vendor Job List

Home Tasks **Jobs** Configuration All Documents Activity Stream Docs list

Jobs for Vendor

Job Number	Job Description	Job Address	Project	
VYR00001	VYR LOT 1 - RICHMOND A	705 VINEYARD RESERVE CT	Vineyard Reserve	 
VYR00002	VYR LOT 002 - MODEL - SER	707 VINEYARD RESERVE CT	Vineyard Reserve	 
VYR00004	VYR LOT 4 - RICHMOND A	711 VINEYARD RESERVE CT	Vineyard Reserve	 
VYR00005	VYR LOT 5 - MOD WESTIN B	713 VINEYARD RESERVE CT	Vineyard Reserve	 
VYR00006	VYR LOT 6 - CASA KEY II A	715 VINEYARD RESERVE CT	Vineyard Reserve	 
VYR00007	VYR LOT 7 - PARKER A	717 VINEYARD RESERVE CT	Vineyard Reserve	 
VYR00009	VYR LOT 9 - SHENANDOAH II	721 VINEYARD RESERVE CT	Vineyard Reserve	 
VYR00010	VYR LOT 10 - SHELBY B	723 VINEYARD RESERVE CT	Vineyard Reserve	 
VYR00011	VYR LOT 11 - OWENBURG A	725 VINEYARD RESERVE CT	Vineyard Reserve	 
VYR00012	VYR LOT 12 - PARKER A	1429 W 12th Street	Vineyard Reserve	 

Display # 10 Page 1 of 3 Total 24

Start Prev 1 2 3 Next End

- The Vendor also has the same job list and same drill down features as provided by the Employee Superintendent. However, vendors are restricted to which fields they can edit.

Vendor Document Search

All Documents

Documents


▼ Search for documents ×

Find by title or description...


Category

 ×

Date start

Date end

[Back to Top](#)

- The Vendor Document Search will be restricted to view only documents contained in the VENDOR category.

Summary of Features – based on User Group

Superintendent

- Set user defaults
- Display list of their active jobs
 - **Drill down to Schedule Tasks and PO's for a specific job**
- Print Purchase Orders
- Edit Schedule Start Date and End Date
- Edit Schedule Task Status
- Edit PO Vendor Status
- View More Details
 - Edit Task Notes, Reason Code, Variance Days, Alerts
 - Edit PO Log notes
- View Schedule in calendar format (D-W-M)
 - Drill down to view task detail from the calendar
 - Drill down to view PO detail from the calendar
- Search Job Documents
- View / Print Job Documents
- Upload Job Documents

Vendor

- Add / Manage their employee login accounts (by User Group)
- Display a list of TASKS – based on default settings
 - Drill down from TASK list to Schedule and PO details
- Display list of their active jobs
 - **Drill down to Schedule Tasks and PO's for a specific job**
- Print Purchase Orders
- Edit PO Vendor Status (Accept-Reject-Done)
- View More Details
 - View Task Notes, Reason Code, Variance Days, Alerts
 - View PO Log notes
- View Schedule in calendar format (D-W-M)
 - Drill down to view task detail from the calendar
 - Drill down to view PO detail from the calendar
- Search Job Documents
- View / Print Job Documents
- Upload Job Documents

Road Map for Future Updates

The BI WebPortal represents an opportunity to greatly enhance the existing Backoffice systems of PSClient, Eclare and Gemini. Below is a roadmap of future planned updates.

Provide more vendor details regarding invoices / payments

Several of our builders have expressed a need for vendors to be able to access invoice payment details. The system will allow the vendors **accounting user group** to run a report similar to the Gemini purchase journal. Of course, this report will only show information specific to that vendor.

Lien Waiver integration to Document Management

When Lien Waivers are printed from Gemini we will utilize a similar logic to the current SEND, which individually sends each lien waiver to their specific vendor via email, however with the BI WebPortal the system will PUBLISH the lien waivers to the vendors document folder.

Additionally, the vendor will be able to upload the signed and notarized waiver on the BI WebPortal using drag and drop.

ToDo's

PSClient utilizes a work flow system (To-Do's). **However currently a user must log into PSClient to view and act on their ToDo's.** The BI WebPortal will give users access to view / edit / create To-Do's directly from their phone or tablet via a browser.

Warranty ToDo's

Warranty activity is managed in PSClient by a specialized To-Do. Once we enable the BI WebPortal to access To-dos our next logical step will be to grant a similar level of access to both customers and vendors. Customers will be able to create a Warranty request and follow up on the status and notes associated with their warranty work orders. Vendors can also view and update their warranty work orders via the BI WebPortal.

Warranty ToDo's (Punch Out)

The PSClient-BI WebPortal interface will allow builder superintendents to walk the job (at Punch-Out walk and/or Home-Owner Orientation walk) and immediately create **To-Do's for items to be resolved.**



Builder Incubator
BI WebPortal 2018 **What's New**

ToDo's camera integration

We are exploring a one click – upload concept to allow a builder superintendent to walk a job, take a photo, add some text and select a vendor and the photo is now attached to the To-do and accessible by the vendor and builder to better understand and/or document the situation.

DocMaintenance expanded

We plan to expand the Document Maintenance function to include the management of vendor purchase orders. The intent will be to allow vendors to upload invoices to their folders, as these are entered in AP the invoice (document) will be attached to the Gemini invoice transaction. This will enable a drill down review, so users can see the vendors invoices related to a specific job and GL cost.

Dashboard

The BI WebPortal offers an excellent platform for a presentation of key metrics. Builders can define certain key reporting metrics (by user type) and then have the data presented in charts and graphs, with drill down details.

Enhanced Sales/Design Interface

The BI WebPortal interface offers some exciting possibilities for the Sales and Design users. One specific planned enhancement is to allow a sales person to create multiple **What If** scenarios for the selection of models & options. For example, under a single client record – a sales person could select different lots / models / options and compare each side by side with the buyer.

Enhanced Customer Experience

The Email campaign already offers a method to improve the customer experience by automatically providing feedback on how their house is progressing and the builder taking a proactive step by step approach to guiding the buyer through each stage of the purchase-selections-build and closing process. Additionally, we see potential to allow the customer to enjoy a much richer experience and some of our builder customers have expressed an interest in pursuing this improved customer interface. Expect some interaction with us – regarding these groundbreaking opportunities.