



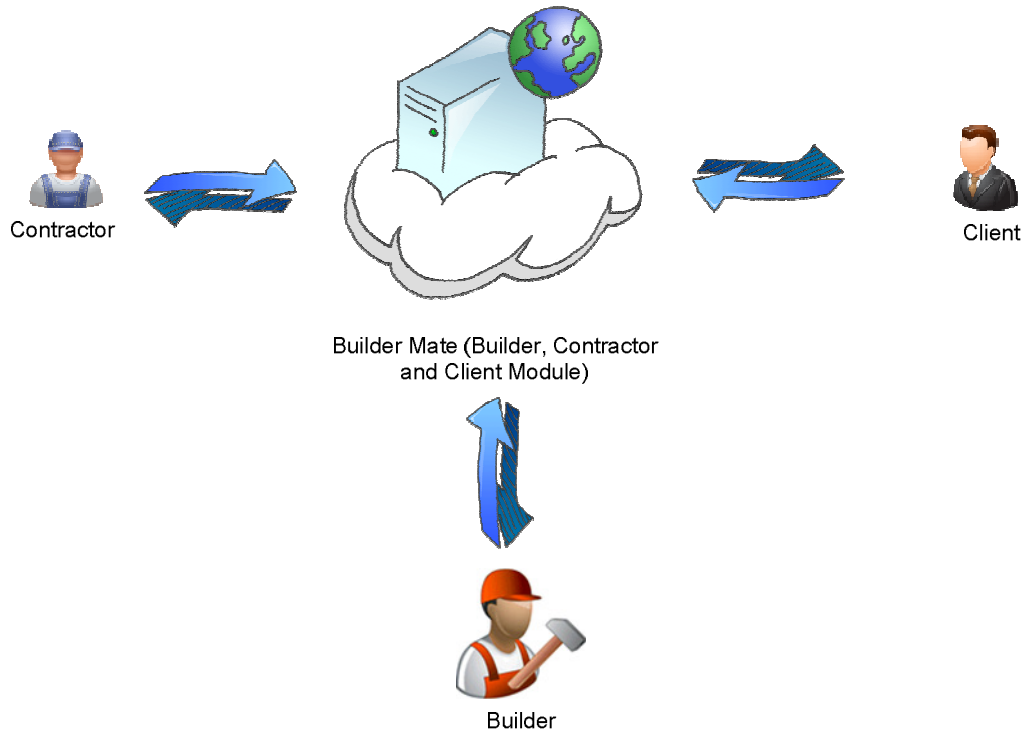
Understanding Builder Mate

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1 Builder Mate

Builder Mate, a web based tool for builders to manage their clients, contractors, suppliers and more importantly the construction processes. Builder mate aims to provide a sound and easy to use communication platform that enables the builder to communicate with stake holders like financial institutions and client's efficiently.



Builder Mate software comprises of the following modules

- Builder Module
- Contractor Module
- Client Module

Each of the above modules have two components

- Web based component which is the primarily responsible for management of the business processes
- Mobile component which is responsible for instant communication and for viewing photographs, documents and notes.

Builder Mate software is developed based on Software as a Service which implies that all the services are rendered via the internet. Builder mate is accessible to

the builder using own unique license name as shown below. This license name is given to the builder upon registration for Builder Mate.



The image shows a login form for 'Builder Mate'. The form has a red header bar with the text 'Welcome to Builder Mate'. Below the header, there are three input fields: 'User Name:' with the placeholder text 'Builder e.g. JohnSmith', 'Password:' with a masked password '•••••', and 'Builder:' with the placeholder text 'LicenseName'. The 'Builder:' field is highlighted with an orange border. To the right of the 'Builder:' field is a 'Login' button. Below the 'Builder:' field is a link that says 'Forgot your password?'.

2 Builder Module

Builder Module is the core component of Builder Mate system.

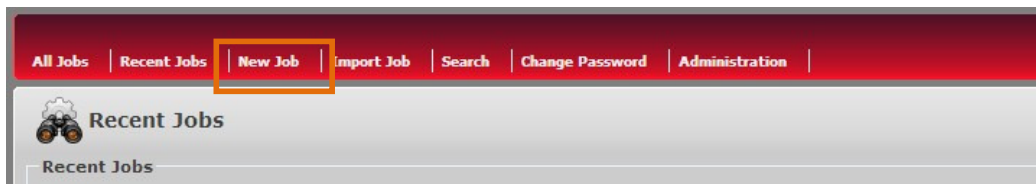
Builders use this module for\as

- Managing building jobs.
 - Managing tasks for each job.
- Document repository for each job.
- System Administration functions
 - User management
 - Managing system parameters and tags

2.1 Job Management

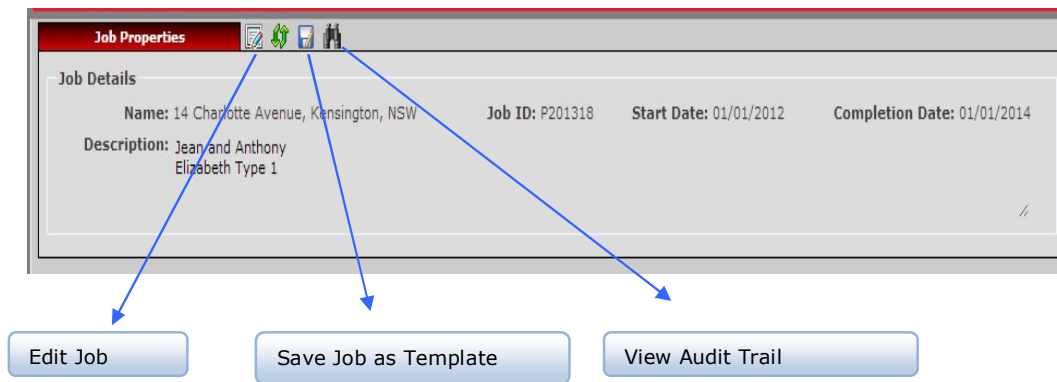
2.1.1 Create Job

Builder can create a new job via the New Job option on the menu as shown below.



New Job allows builder to specify Name of the job, Start, Completion date and job description.

Once job is created, job properties are listed in the Job Property section as shown below



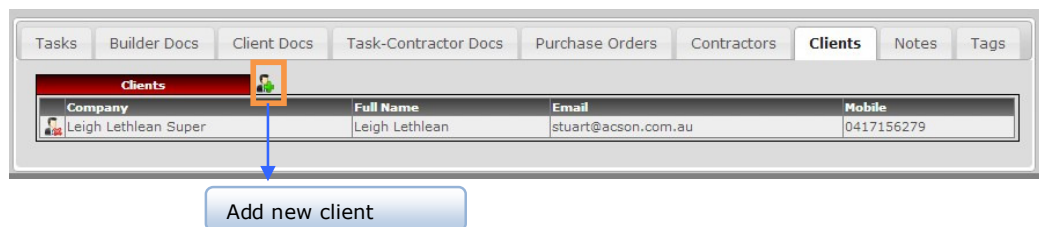
Edit Job allows the builder to edit job properties.

Save Job as Template allows the builder to save a job as a template. Refer the [template management](#) section to more details.

View [audit trail](#) allows the builder to view all the actions performed on the job.

2.1.2 Clients

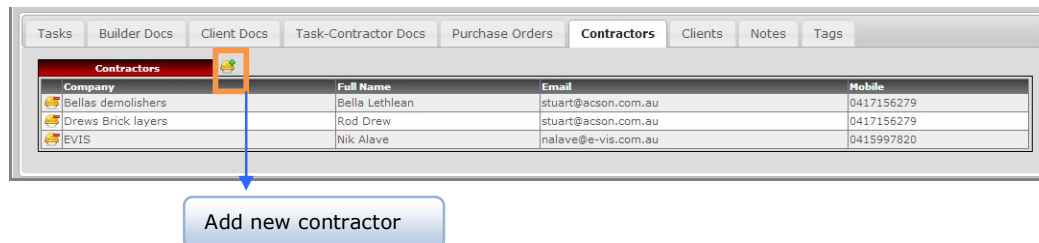
Clients for a job are listed under the Clients tab as shown below.



New clients are added to builder mate via User Management section.

2.1.3 Contractors

Builder will generally have large number of contractors in the system which are managed from within User Management section. For each job the builder will have a specific list of contractors. These contractors are listed under the contractors tab as shown below.



2.2 Task Management

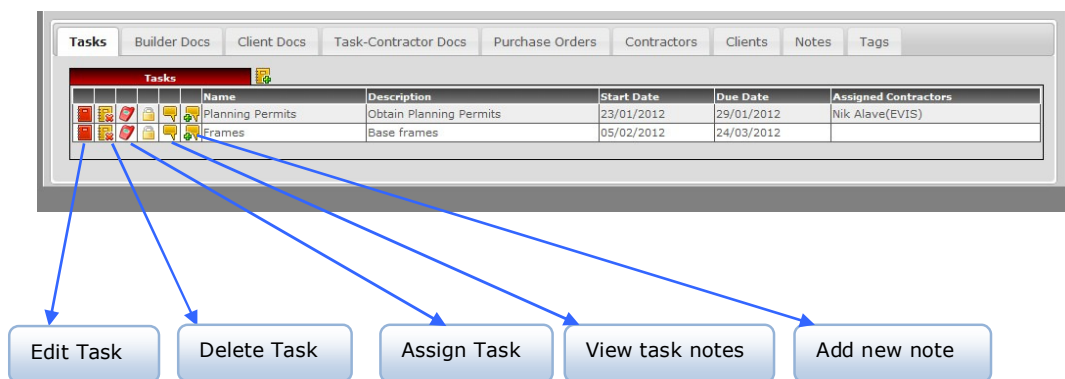
Building job will generally comprise of number of tasks.

Following are important task features

- Task can be assigned to one or more contractors
- Task Documents section holds all the documents that are specific to the task.
- Builder can add notes specific to the task.
- Builder can classify a task using tags.
- Task notification feature will trigger notifications when task is due and also when it is overdue.

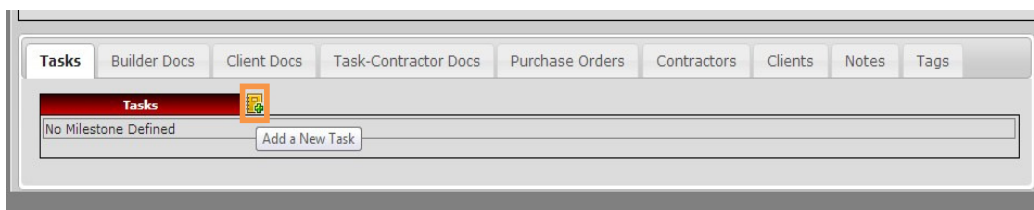
2.2.1 Task List

All the tasks for a job are listed in the task list. Tasks are listed by the task due date.



2.2.2 Create Task

To add a new task to a job builder will click Add New Task button in Task tab as shown below



When creating a new task the builder needs to specify the task name, description, start date and due date.

Add a New Task

Task Details

Name: Frames

Start Date: 02/04/2013

Due Date: 31/05/2013

Closed Date:

Description: Base Frames

Upload Files

Assigned Contractors

Upload files allows the builder to upload documents that are specific to this task.

Assigned Contractors list all the contractors that are assigned to this task.

2.2.3 Assign contractor to task

Builder can notify multiple contractors about available tasks. To do so the builder uses the Notification Email and SMS feature as shown below. Using this feature the builder can send all the documents that are related to this task to the contractors via email attachments. Builder has the option of notifying the contractors via email and instant message (sms).

Tasks						
<div> Tasks Builder Docs Client Docs Task-Contractor Docs Purchase Orders Contractors Clients Notes Tags </div>						
	Name	Description	Start Date	Due Date	Assigned Contractors	
	Planning Permits	Obtain Planning Permits	23/01/2012	29/01/2012	Nik Alave(EVIS)	
	Frames	Base frames	05/02/2012	24/03/2012		

Notify Contractors

Notification Email and SMS

Options

Message Options: ☒ SMS and Email ☐ Email Only

Notification Options: ☒ Task Offer Notification ☐ Notification Only

Limit:

Contacts

	Company Name	Full Name	Email	Mobile Number
<input checked="" type="checkbox"/>	Drews Brick layers	Rod Drew	stuart@acson.com.au	0417156279
<input checked="" type="checkbox"/>	EVIS	Nik Alave	nalave@e-vis.com.au	0415997820

Attach Documents

<input type="checkbox"/>	Document Name	Description	Upload Time	File Size
<input type="checkbox"/>	Chrysanthemum.jpg	Base Drawing	5/04/2013 2:26:25 PM	0.84 MB
<input type="checkbox"/>	Planning Permit.PDF	Approved Planning Permit	5/04/2013 3:21:01 PM	0.02 MB
<input type="checkbox"/>	Plans.PDF	Structural Plans	5/04/2013 3:21:39 PM	0.02 MB

Email Details

Subject:

Message:

Notification Options

- **Task Offer Notification** → Sends out a task offer notification indicating that this task is available to accept.
- **Notification Only** → Sends out notification. This can be used to send documents to the contractor at a later stage.

List of contractors to be notified

Documents related to the task.

Email Subject and Message

All the contractors listed in the contractors list above will be notified about the available task along with the attached document. The contractor can then accept the task via the contractor mobile app or via the web based contractor component.

Builders can choose whether their contractors can directly accept a task via builder mate or builders can assign the tasks manually. This is governed by the "AssignContractorOptions" parameter in the system parameters which has the following to options

- **AssignDirectly** → Assigns the contractor directly to the task. In case of multiple contractors, the contractor who accepts the task first will get the task. Once the contractor has accepted the task the builder will be sent an email and this action will be captured in the audit trail section.
- **DelayedAssignment** → In this case when the contractor expresses interest in accepting the task the builder will receive an email with details of the task and the interested contractor.

In case of the DelayedAssignment option, the builder will assign contractor to the task via the Edit Task feature as shown below.

Edit Task Properties

Task Details

Name: Frames

Start Date: 05/02/2012

Due Date: 24/03/2012

Closed Date:

Description: Base frames

Upload Files

	Document Name	Description	Upload Time
	Chrysanthemum.jpg	Base Drawing	05/04/2013 14:26
	Planning Permit.PDF	Approved Planning Permit	05/04/2013 15:21
	Plans.PDF	Structural Plans	05/04/2013 15:21

Assigned Contractors

	Company	Contact	Email	Mobile	Status
	EVIS	Nik Alave	nalave@e-vis.com.au	0415997820	PendingAcceptance
	Deanna Drielsma	Rod Drew	stuart@acson.com.au	0417156279	PendingAcceptance

Assign Contractor To Task

Status

PendingAcceptance → indicates that the contractors have not yet accepted the task or the task has not been assigned.

Assigned → Task is assigned to the contractor.

2.3 Document Management

Builder Mate allows the builder to capture all the documents that are related to the building job.

2.3.1 Attach\Upload Document

Builder can attach document(s) as shown below.

Tasks **Builder Docs** Client Docs Task-Contractor Docs Purchase Orders Contractors Clients Notes Tags

Builder Documents

	Document Name	Description	Upload Time	Unread Messages
	BuildingCost.jpg	Building Cost Estimate	8/04/2013 9:14:33 AM	
	ABC Contractor Invoice.jpg	Contractor Invoice	8/04/2013 9:14:36 AM	

Attach Document

Click Upload to select display Open File window as shown here

Builder can upload multiple files by pressing CTRL and selecting multiple documents or CTRL + A to select all the documents in the folder

Builder can specify description for each document.

To make a document available to the client builder can click the Public check box

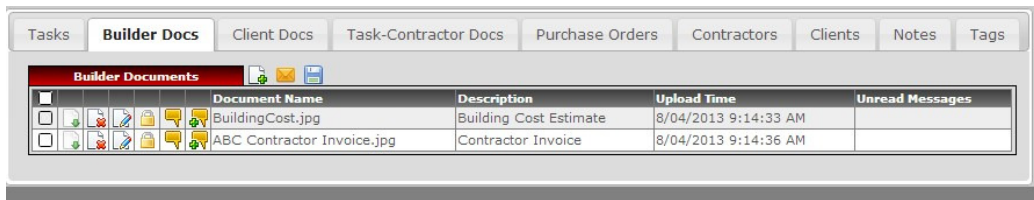
To remove a document from upload list click the "X"

2.3.2 Document Classification

Builder mate documents are classified in as

Builder Docs

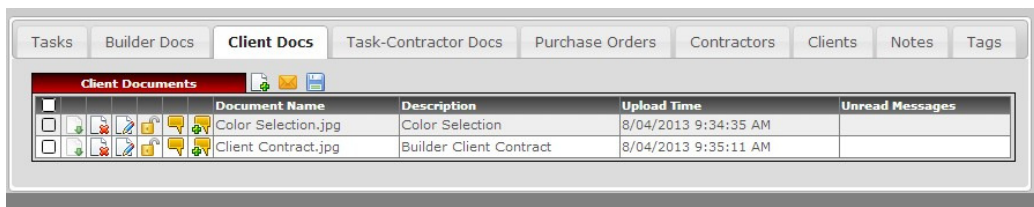
All the documents that are private to the builder will be listed in this area. Builder Docs are displayed for each job on the Builder Docs tab as shown below



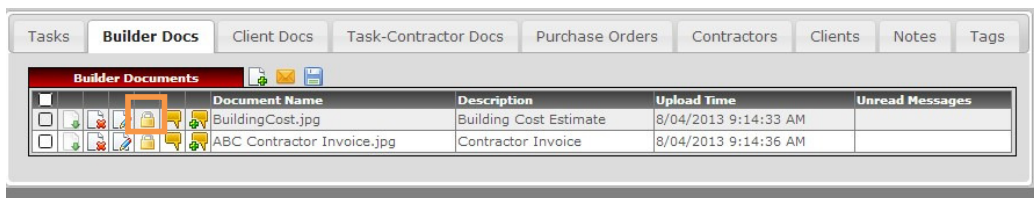
Client Docs

The builder can make documents accessible to his clients by marking documents public when uploading the document(s) to the system. Documents made public are accessible to the client via the client web component as well as mobile apps.

All the public documents are listed in the Client Docs tab as shown below



Builder can also mark builder's documents public by clicking make document public as shown below



Task-Contractor Docs

Builder Mate allows the builder to attach documents to the tasks as show below. These documents are specifically relevant to the task.

Task Details


Name: Planning Permits

Start Date: 23/01/2012


Due Date: 29/01/2012

Closed Date:

Description: Obtain Planning Permits

Upload File: 

Assigned Contractors

Company	Contact	Email	Mobile	Status
 EVIS	Nik Alave	nalave@e-vis.com.au	0415997820	Assigned

Tasks

Builder Docs

Client Docs

Task-Contractor Docs

Purchase Orders

Contractors

Clients

Notes

Tags

Tasks-Contractor Documents

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	Document Name	Description	Upload Time	Unread Messages
<input type="checkbox"/>	Chrysanthemum.jpg	Base Drawing	5/04/2013 2:26:25 PM	
<input type="checkbox"/>	Planning Permit.PDF	Approved Planning Permit	5/04/2013 3:21:01 PM	
<input type="checkbox"/>	Plans.PDF	Structural Plans	5/04/2013 3:21:39 PM	

2.3.3 Email and Download Document(s)

Builder can email document(s) to contractors via email feature.

Tasks

Builder Docs

Client Docs

Task-Contractor Docs

Purchase Orders

Contractors


Clients

Notes

Tags

Builder Documents





<input checked="" type="checkbox"/>		Document name	Description	Upload Time	Unread Messages
<input checked="" type="checkbox"/>	    	BuildingCost.jpg	Building Cost Estimate	8/04/2013 9:14:33 AM	
<input checked="" type="checkbox"/>	    	ABC Contractor Invoice.jpg	Contractor Invoice	8/04/2013 9:14:36 AM	

The screenshot shows a software window titled "Email Selected Documents". At the top left is a "Contacts" section with a small icon. Below it is a table with four columns: "Company Name", "Full Name", "Email", and "Mobile Number". The table contains three rows of data. The first two rows have an "X" in a checkbox column to their left. The third row has an "X" and a blue arrow pointing to it from the right. To the right of the table are two blue callout boxes: "Select contractors" with an arrow pointing to the "Contacts" header, and "Remove contractor" with an arrow pointing to the "X" in the third row. Below the table is a text area labeled "Message:" containing the text "Sample Email Message". A blue arrow points from a callout box labeled "Specify email message" to this text area. At the bottom right are "Submit" and "Cancel" buttons.

	Company Name	Full Name	Email	Mobile Number
<input checked="" type="checkbox"/>	Bellas demolishers	Bella Lethlean	stuart@acson.com.au	0417156279
<input checked="" type="checkbox"/>	Drews Brick layers	Rod Drew	stuart@acson.com.au	0417156279
<input checked="" type="checkbox"/>	Evis	Nik Alave	nalave@e-vis.com.au	0415997820

Message: Sample Email Message

Buttons: Submit, Cancel

Annotations:

- Select contractors (points to Contacts header)
- Remove contractor (points to X in third row)
- Specify email message (points to Message text area)

Builder can download individual documents or multiple documents as a zip file as shown below

Download single document

Download multiple documents

Tasks **Builder Docs** Client Docs Task-Contractor Docs Purchase Orders Contractors Clients Notes Tags

Builder Documents

	Document Name	Description	Upload Time	Unread Messages
<input checked="" type="checkbox"/>	BuildingCost.jpg	Building Cost Estimate	8/04/2013 9:14:33 AM	
<input checked="" type="checkbox"/>	ABC Contractor Invoice.jpg	Contractor Invoice	8/04/2013 9:14:36 AM	

2.4 Template Management

Builder mate allows the builder to create job templates which can be reused when creating new jobs.

Save Job as template

The screenshot shows the 'Job Properties' page with the following details:

- Job Details:**
 - Name: 14 Charlotte Avenue, Kensington, NSW
 - Description: Jean and Anthony Elizabeth Type 1
 - Job ID: P201318
 - Start Date: 01/01/2012
 - Completion Date: 01/01/2014
- Tasks:**
 - Builder Docs, Client Docs, Task-Contractor Docs, Purchase Orders, Contractors, Clients, Notes, Tags
- Tasks Table:**

Name	Description	Start Date	Due Date	Assigned Contractors
Planning Permits	Obtain Planning Permits	23/01/2012	29/01/2012	Nik Alave(EVIS)
Frames	Base frames	05/02/2012	24/03/2012	Nik Alave(EVIS)

A blue arrow points from the 'Import Job' button in the top navigation bar to a callout box labeled 'Save Job as template'.

The 'Save As Template' dialog box contains the following fields:

- Template Details:**
 - Name:
 - Save Tasks: ☒ Yes
 - Save Contractors: ☐ Yes
- Buttons: Submit, Cancel

A blue arrow points from the 'Save Tasks' checkbox to a callout box stating: 'Job template can save tasks and also the contractors used in the current job.'

Create new job from template (Import Job)

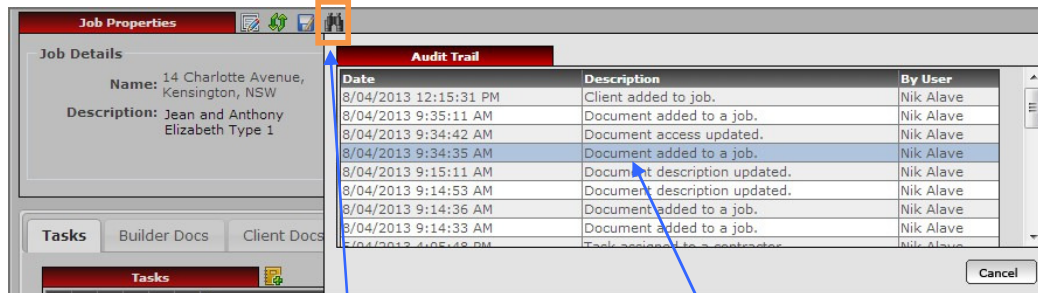
The screenshot shows the 'Import Job' page with the following details:

- Recent Jobs:** (Section header)
- Job Details:**
 - Name:
 - Start Date:
- Select Template For Import:**
 - ☐ Hawthorn Template 1
 - ☐ Job Template
 - ☐ Stuart Template 1
 - ☐ Test Template
 - ☐ Sample Template
- Buttons: Submit, Cancel

A blue arrow points from the 'Import Job' button in the top navigation bar to a callout box stating: 'Select template from list to create a new job based on the selected template'.

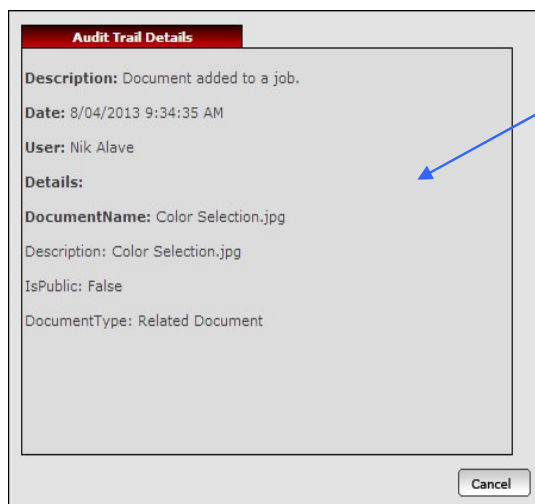
2.5 Audit Trail

Builder mate captures all the actions associated with a job in our "audit trail" .



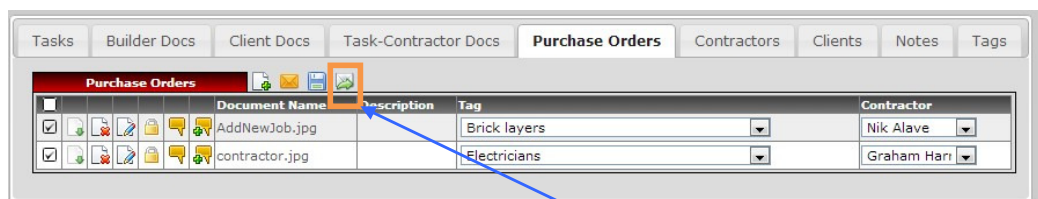
View Audit Trail for Job

Click on a audit trail record to view details of the action



2.6 Purchase Orders

Builders can manage purchase orders for a job via the Purchase orders tab.



Builder can email multiple purchase orders to contractors by selecting the tag and its responding contractor.

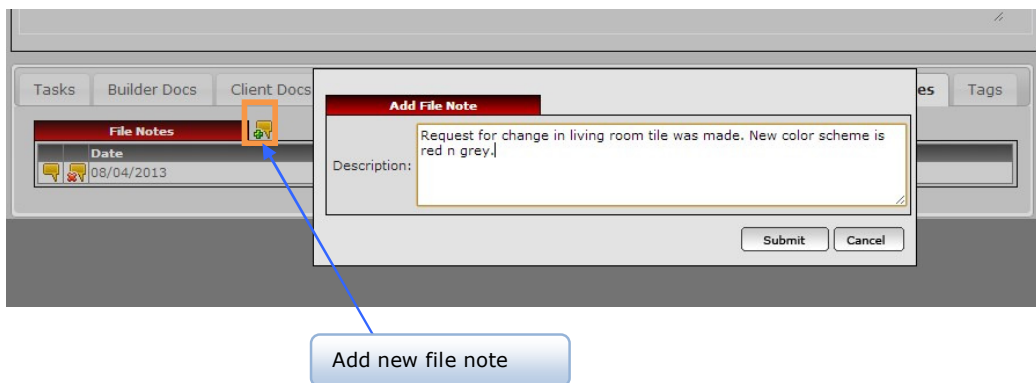
Add, email and download purchase order functions are exactly same as builder docs.

2.7 File Note

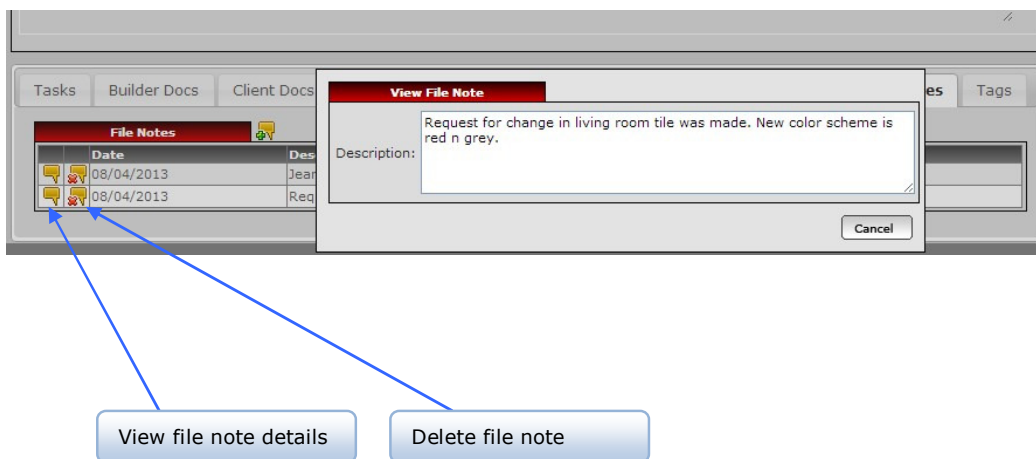
Builder mate allows builders to capture notes\comments for various entities in the system. File notes can be added for the following entities

- Job
- Task
- Documents
- Users

Adding File to Job



View and Delete Note



2.8 Administration

2.8.1 User Management

Builder mate has following three different types of users

- Builder → this user type is for the builder and his staff members. Builder user is responsible for the system. Builder Mate is licensed based on the number of Builder users in the system.
- Contractors → this user type represents the contractors that will be assigned to perform task.
- Clients → this user type represent builder's client for whom the builder is doing the construction job.

Adding Builder\Contractor\Client

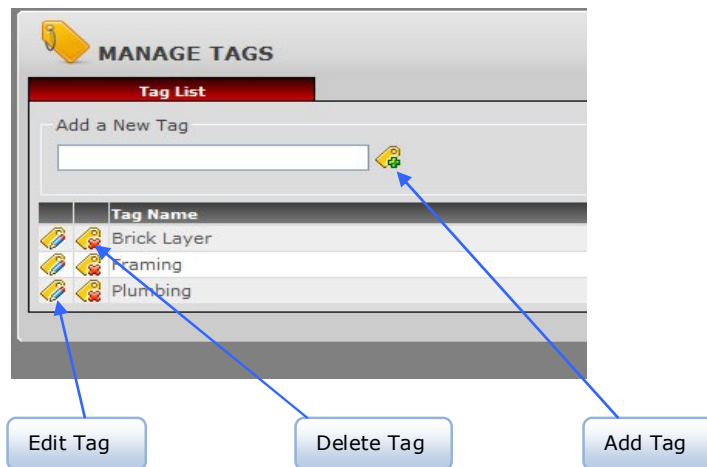
The screenshot shows the 'Add A New User' form with the following fields and annotations:

- User Type:** A dropdown menu with options: Builder, Contractor, Client. An annotation box labeled 'User Type' points to this dropdown.
- Company:** A text input field.
- UserName:** A text input field.
- Password:** A text input field.
- Confirm Password:** A text input field.
- Status:** A checkbox labeled 'Active' which is checked.
- System Admin:** A checkbox labeled 'Yes' which is unchecked. An annotation box points to this checkbox with the text: 'Only Builder can be system administrators'.
- Title:** A text input field.
- Mobile:** A text input field. An annotation box points to this field with the text: 'Mobile Number is mandatory as the instant messaging relies on this information.'
- Telephone:** A text input field.
- Tags:** A section with a tag icon and a text input field. An annotation box points to this section with the text: 'Tags can be assigned to users especially contractors representing type of trade.'
- Buttons:** 'Submit' and 'Cancel' buttons at the bottom right.

2.8.2 Manage Tags

Tags represent labels that can be used to label\categorize various entities in the system like contractors who are electricians can be label as "Electricians" or jobs can be assigned tags since jobs can be searched based on the tags assigned to them.

Add\Edit\Delete



2.8.3 System Parameters

Builder Mate system has following system parameters

- Number of Milestone Escalation Alert - Is the number of days system will wait before sending out escalation alert emails for tasks which are overdue.
- Number of Milestone Reminder Alert - Is the number of days prior to the due date of a task will the system email the assigned contractor and also the builder.
- [AssignContractorOptions](#) refer to section "Assign Task To Contractor".

3 Contractor Module

Contractor web module and mobile apps are used by the contractors in Builder Mate. Each contractor created in Builder mate will have access to the system which will be controlled by the builder.

3.1 Assigned Task (My Tasks)

When contractor logs into the Contractor web component he is shown the list of tasks that are assigned to him by the builder under My Tasks as shown below.

My Tasks							
Task Name	Complete	Task Description	Start Date	Due Date	Job Name	Job Description	Job ID
Planning Permits	Completed	Obtain Planning Permits	23/01/2012	29/01/2012	14 Charlotte Avenue, Kensington, NSW	Jean and Anthony Elizabeth T...	P201318
Frames		Base frames	05/02/2012	24/03/2012	14 Charlotte Avenue, Kensington, NSW	Jean and Anthony Elizabeth T...	P201318
Test	Completed		21/11/2012	27/11/2012	46 Primrose St Moonee Ponds 3039	46 Primrose St Moonee Ponds 30...	P201212
Sample	Completed	Sample	08/03/2012	14/03/2012	Sample Job 06032012	Sample Job	P201211

[Jump to task details](#)

Contractor can click on a task in the task list to view the details of the task.

3.1.1 Assigned Task Details

Task details for assigned task are shown below

Task Details

Job Properties

Job Details

Name: 14 Charlotte Avenue, Kensington, NSW
Job ID: P201318
Start Date: 01/01/2012

Description: Jean and Anthony Elizabeth Type 1

Task Properties

Task Details

Name: Frames
Start Date: 05/02/2012
Due Date: 24/03/2012
Description: Base frames

Task Documents

	Document Name	Description	Upload Time
<input type="checkbox"/>	Chrysanthemum.jpg	Base Drawing	5/04/2013 2:26:25 PM
<input type="checkbox"/>	Planning Permit.PDF	Approved Planning Permit	5/04/2013 3:21:01 PM
<input type="checkbox"/>	Plans.PDF	Structural Plans	5/04/2013 3:21:39 PM

Mark Complete will mark this task complete. An email will be sent to the builder notifying him that this task has been complete.

Job and Task properties display the details of the job and property. Contractor can view and add notes to the task.

Task Documents list all the documents attached to this specific task which can be retrieved. Contractor can attach documents, add and view notes attached to documents.

3.2 Available Tasks


Available tasks list displays a list of all the tasks that are available for the contractor to accept as shown below.

Available Tasks							
Task name	Complete	Task Description	Start Date	Due Date	Job Name	Job Description	Job ID
Demolish house and clear block		30 Bay street Port Melbourne S...	21/03/2013	17/04/2013	Port Melbourne 30 Bay street 5 levels, 30 units.	30 x 3 bedroom/2 bathroom unit...	P201317
Planning Permits		Obtain Planning Permits	23/01/2012	29/01/2012	14 Charlotte Avenue, Kensington, NSW	Jean and Anthony Elizabeth T...	P201318

[Jump to task details](#)

3.2.1 Available Task Details

Available task details page displays the contractor various details related to the job and the task. It also allows the contractor to download documents related to the task.


Available Task Details
[Express Interest](#)

Job Properties

Job Details

Name: Port Melbourne 30 Bay street 5 levels, 30 units. **Job ID:** P201317 **Start Date:** 20/03/2013

Description: 30 x 3 bedroom/2 bathroom units, each have two car park spaces, top level has penthouse suite, 5 bedroom, two balconies, 4 bathrooms 2 living areas

Task Properties

Task Details

Name: Demolish house and clear block

Start Date: 21/03/2013 **Due Date:** 17/04/2013

Description: 30 Bay street Port Melbourne site has 2 x single story units, 25 sq in size, brick with tile roof. slab, access only from bay st, need to get permits, traffic issues

Task Documents

Document Name	Description	Upload Time
PSC_0005.JPG	site plans 30 bay st pt melb	27/02/2013 1:21:48 PM

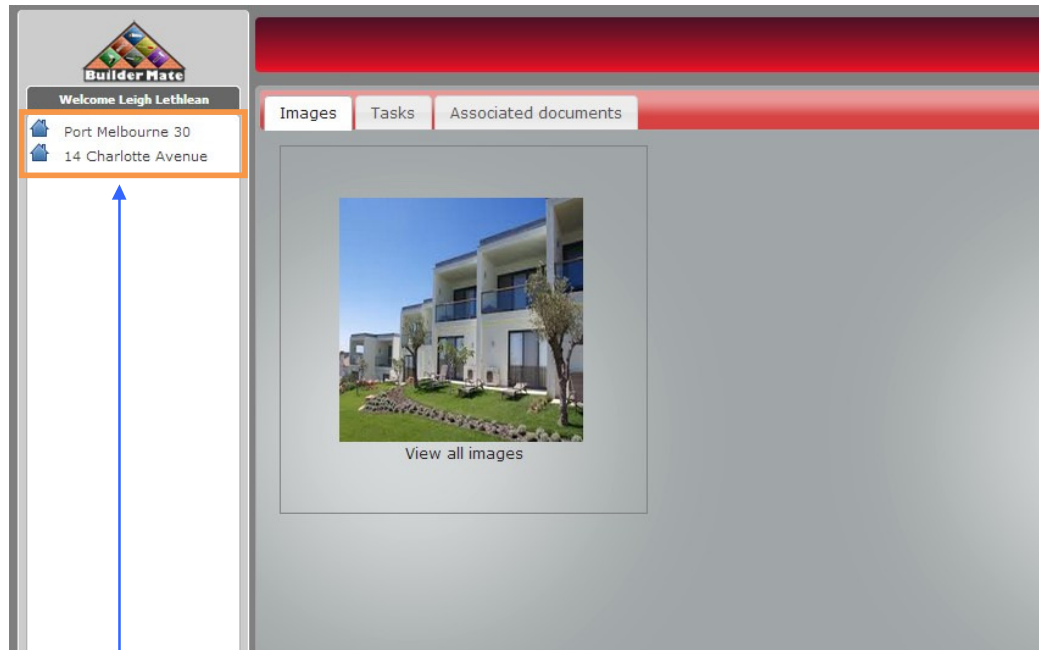
Express Interest button is shown if the **AssignContractorOptions** is "DelayedAssignment". In this case an email will be sent to the builder notifying him that the contractor has expressed interest in this task.

Job and Task properties display the details of the job and property.

Task Documents list all the documents attached to this specific task which can be retrieved.

4 Client Module

Client module and mobile apps allows builder's clients to access their building jobs. Builder controls this access via the User Management. When client logs into the system they see a list of their current jobs as shown below



Job list displays list of jobs that belong to this client.

Image\Photo album displays photos of the job as photo gallery.

Associated documents list all the public documents including images\photographs that can be downloaded as shown below

