

---

# **Buildertrend Project Manager Certification- Final Exam**

---

Which of the following are tools you have available when working with documents in Buildertrend: - ✓✓ANSW✓✓..Sign  
Request Signature  
Annotate

Who can approve a selection choice? - ✓✓ANSW✓✓..1 The Home Owner  
1 Subs/Vendors  
1 Internal Users

Who can be assigned to a To-Do? - ✓✓ANSW✓✓..Subs/Vendors  
Home Owners  
Internal Users

Who can log in to Buildertrend's mobile application? - ✓✓ANSW✓✓..Active  
Subs/Vendors  
Active Home Owners  
Active Internal Users

Who can potentially have access to folders and files stored within Global Documents? -  
✓✓ANSW✓✓..Internal Users  
Subs/Vendors  
Home Owners

Who can use the mobile application? - ✓✓ANSW✓✓..-Subs and Vendors that have  
been invited to use Buildertrend.  
-Internal Users that have been invited to use Buildertrend.

-Home Owners that have been invited to use Buildertrend.

Who can view the schedule while it is Offline? - ✓✓ANSW✓✓..Internal Users

Why are comments useful? - ✓✓ANSW✓✓..They keep correspondence logged for historical record.

They keep past discussions accessible.

They allow you to be able to have discussions with multiple people on an item.

Why is it important to have the Contract Price added in the Job Info tab? -

✓✓ANSW✓✓..It is the base number for the job running total calculation.

You can annotate PDFs on Buildertrend's full site, but cannot add annotations from the mobile application. - ✓✓ANSW✓✓..False

A customer only has access to selections that have been released to them. -

✓✓ANSW✓✓..True

Allowances will feed into your Estimate... - ✓✓ANSW✓✓..Once the allowance has been created.

An Internal User can create a Message signature within their Preferences tab. -

✓✓ANSW✓✓..True

Are you able to copy both selections, as well as individual choices? -

✓✓ANSW✓✓..Yes

Are you able to reassign schedule items in mass from one user to another? -

✓✓ANSW✓✓..Yes

Bids must be approved before they will show up in your Budget and Estimate. -

✓✓ANSW✓✓..False

Bills and Purchase Orders help manage job expenses. - ✓✓ANSW✓✓..True

Can a user assign someone other than themselves to an activity? - ✓✓ANSW✓✓..Yes

Can an activity template be applied to multiple leads at one time? - ✓✓ANSW✓✓..Yes

Can every user within Buildertrend add new leads? - ✓✓ANSW✓✓..Yes, as long as they have the appropriate permissions.

Can Subs and Vendors use the Time Clock feature? - ✓✓ANSW✓✓..No

Can the color and symbol of an activity type be customized? - ✓✓ANSW✓✓..Yes

Can To-Dos be linked to schedule items? - ✓✓ANSW✓✓..Yes

Can you import the information from a Contact already in Buildertrend into a new lead? - ✓✓ANSW✓✓..Yes

Can you share Daily Logs with specific subcontractors on a job? - ✓✓ANSW✓✓..No

Can you turn a lead marked as Sold back into an Open lead? - ✓✓ANSW✓✓..Yes, by reclassifying the lead.

Does a home owner need more than one username and password in order to access multiple jobs? - ✓✓ANSW✓✓..No

Does the Time Clock track a User's location when clocking in and out? - ✓✓ANSW✓✓..Yes

How can a home owner's access to features be customized? - ✓✓ANSW✓✓..By adjusting the owner options within Job Details.

How can I filter my jobs list to show a certain type of project? - ✓✓ANSW✓✓..Use Job Groups

How can you bring a bid from a subcontractor into an estimate? - ✓✓ANSW✓✓..1 -Use the include in budget check box.

-Approve the bid.

1 -Create a purchase order for the bid amount.

1 -Select the transfer to estimate button within the bid -details tab.

How do Subcontractors become active within Buildertrend? - ✓✓ANSW✓✓..They must be invited.

How do you account for a holiday on the schedule? - ✓✓ANSW✓✓..Create a workday exception.

How do you find your leads after they are categorized as Lost or Sold? - ✓✓ANSW✓✓..Use your Filter to search for the appropriate lead status.

How do you run reports over your lead information? - ✓✓ANSW✓✓..1 -By selecting the Reports button.

-By exporting the grid information to Excel.

1 -By going to Setup and selecting the Run Account Report - Leads option.

1 -By utilizing the Filter and Grid Settings.

How many attachments can be added to Daily Logs and To-Dos? -  
✓✓ANSW✓✓..Unlimited

How many certificates can be uploaded to each Subcontractor? General Liability,  
Workman's Comp, etc. - ✓✓ANSW✓✓..4

How many proposals can be approved by a lead opportunity? - ✓✓ANSW✓✓..1  
2  
3

How many proposals can be created and released to a lead opportunity? -  
✓✓ANSW✓✓..As many as necessary.

How many salespeople can be assigned to a lead opportunity? - ✓✓ANSW✓✓..As  
many as needed.

If you email a lead through Buildertrend, when they respond, do you need to log in to  
Buildertrend in order to reply to their email? - ✓✓ANSW✓✓..No

In Buildertrend, these provide the basic financial framework for more detailed job  
costing. - ✓✓ANSW✓✓..Cost Codes

In what ways can the Contract Price be established on a job? - ✓✓ANSW✓✓..-Copied  
from the job estimate.  
-From an approved proposal when the job is converted from a lead.  
-Manually written into the contract price field within the Job Info tab.

Is it possible for a user to see all lead activities for all salespeople? - ✓✓ANSW✓✓..Yes

Is it possible to restrict who is allowed to assign a salesperson to a lead? -  
✓✓ANSW✓✓..Yes

Is there a limit to how many grid views can be created for your Buildertrend account? -  
✓✓ANSW✓✓..No

Is there a limit to the number of files that can be attached to a lead opportunity? -  
✓✓ANSW✓✓..No

Is there a way to set parameters on how long an owner can put in a warranty claim? -  
✓✓ANSW✓✓..Yes, in the owner options area.

Labor costs from the Time Clock feature can be displayed in your Budget. -  
✓✓ANSW✓✓..True