



buildermt.com | 888.757.1991

field variance **PO process**



overview

The BuilderMT VPO process uses the BPM tool for creating, sending, and approving variance purchase orders on a mobile device. It uses simple web forms and integrates with WMS database in real-time.

Configure simple criteria such as:

- Dollar amount threshold for automatic approval of VPOs
- E-mail addresses to use for routing, reviewing and approving VPOs
- Establish a VPO item number in Estimating
- Communication method for your suppliers (process can accommodate suppliers who do not use e-mail with the addition of one simple step)
- It's a flexible process. With a few tweaks based on your business needs, you can be up and running quickly.

workflow

1.

The screenshot shows the 'BuilderMT VPO Process' mobile app interface. It features three dropdown menus: 'Choose Job:', 'Choose Variance Code:', and 'Choose Trade:'. A list of job codes and descriptions is displayed, including 'AH00000 - Antelope Hill Community' through 'AH00111 - Antelope Hill - Lot 111'. At the bottom, it shows 'Version: 5.0.4.31 Standard Process' and 'Copyright 2014 B'. A 'Continue' button is visible in the bottom right corner.

» Field staff selects Job and other criteria

2.

The screenshot shows the 'BuilderMT VPO Process' mobile app interface for Job: AH00013, Supplier: George's Excavation. It features a 'Choose Item:' dropdown menu with '900020100 - 1020 - Fill Dirt (3)' selected. Below the dropdown is a 'Qty:' field with '1' and an 'Override Cost:' field with '0'. An 'Item Note:' text area is also present. The 'Selected VPO Items:' section contains a table with columns: Phase Code, Item Number, Description, Item, and Notes. The table has one row: 900020100, 1020, Fill Dirt, Bring in the necessary fill dirt to 600, and Variance Purchase Order - AH00013 - Excavation- Submittal Receipt. Below the table is a 'The following email is your Variance Purchase Order submittal receipt:' section with project and job information. At the bottom, there are 'Back' and 'Remove Item' buttons, and a summary table with columns: Phase Code, Item Number, Description, Notes, Qty, and Cost. The summary table has one row: 900020100, 1020, Fill Dirt, Bring in the necessary fill dirt to correct the grade variation on this lot, 200, 54.43. The total is \$1,088.80.

» Field staff processes VPO request

workflow (cont'd.)

3.

BuilderMT VPO Process

Area: Antelope Hill Work Supplier: George's Excavation
 Job Number: AH00013 Back Charge Supplier:
 Job Address: 1013 Deer Trail VPO Date: 7/25/2014 8:40:09 AM
 Field Supervisor: Jim Andrews Variance Code: data name

| Phase Code | Item Number | Description | Notes | Qty | Unit of Measure | Cost | Pre-Tax Total |
|------------|-------------|-------------|--|--------|-----------------|-------|---------------|
| 900020100 | 1020 | Fill Dirt | Bring in the necessary fill dirt to correct the grade variation on this lot. | 200.00 | yd | 54.43 | 10,886.00 |

Requestor Comments (private): Not Found

Total: 10,886.00

Decline Approve

» If VPO request exceeds the user-specified threshold dollar amount, then it is routed to a Manager for approval. If not, it is auto-approved and the process continues.

4.

BuilderMT MANAGEMENT TECHNOLOGY

VARIANCE ORDER
 AH00013-049
 JOB NUMBER: AH00013
 ORDER DATE: 1/25/2012

VENDOR:
 George's Excavation
 8700 Bellfountain Road
 Denver CO 80100
 Phone: (303)847-6201
 Fax: (303)847-6200

JOB ADDRESS:
 1013 Deer Trail
 Lakewood CO 80228

| Job Type | Supervisor | Estimator | Model | Lot Swing |
|----------|--------------|---------------|---------|-----------|
| SF | Mike Parsons | Andrew Bensen | SUNDOWN | R |

PLEASE SUPPLY THE FOLLOWING:

| ITEM | ITEM DESCRIPTION | QTY | UNIT | PRICE | TOTAL |
|-----------|-----------------------|--------|------|--------------------|------------------|
| **** | 2010 Excavation **** | | | | |
| 900020100 | 1020 Fill Dirt | 200.00 | yd | 54.43 | 10,886.00 |
| | Fill dirt for grading | | | | |
| | | | | Net Order | 10,886.00 |
| | | | | Tax | 783.79 |
| | | | | TOTAL ORDER | 11,669.79 |

The work has been completed according to the terms and conditions stated in our contract.
 Authorized Signature: _____
 By: _____
 Company: George's Excavation Date: _____ Builder: _____ Date: _____

» Trade, Supplier and Vendor receives VPO

5.

Issue Purchase Orders

AH00013 1013 Deer Trail

| Label | Value |
|----------------------|--|
| Phase/Item Number | 900020100 1020 |
| Item Description | Fill Dirt |
| Item Notes | Bring in the necessary fill dirt to correct the grade variation on this lot. |
| Order Qty | 200.00 |
| Order Unit | yd |
| Order Unit Price | 54.43 |
| Order Amount | 10,886.00 |
| Lump Sum | |
| Use Estimate | |
| Error/Warnings | 1 Error : Invalid JC Category 1 Warning : Using Lump Sum |
| Tabular | |
| Tax Details | SDEN 783.792 |
| Estimate Number | 3 |
| Opt Number | Base Sundown - Base House |
| Release Code | 05 |
| Activity | 2010 Excavation |
| LOCATION | |
| Sort WBS/Dept | 900020100 |
| Job Cont Code | 2022010 |
| Job Cont Category | 24 |
| Tracking Variance | |
| Variance JC Category | |
| Variance Amount | |
| Original Amount | |
| PO Number | AH00013-049 |

» WMS is updated automatically

6.

BuilderMT VPO Process

Job Number: AH00013

Work Supplier Orders: Work Supplier: George's Excavation

| PO Number | Description | Issued Date | Amount | TaxAmount | Total |
|-------------|-----------------|-------------|-----------|-----------|-----------|
| AH00013-049 | 2010 Excavation | 07/25/2014 | 10,886.00 | 783.79 | 11,669.79 |

Backcharge Supplier Orders: Backcharge Suppliers

| PO Number | Description | Issued Date | Amount | TaxAmount | Total |
|-----------|-------------|-------------|--------|-----------|-------|
|-----------|-------------|-------------|--------|-----------|-------|

Requestor Comments (private): Not Found

» Field staff can approve payment once VPO has been fulfilled. WMS is updated automatically

summary

The BuilderMT VPO Process has been designed to allow field staff to request a Variance Purchase Order in the field, using a mobile device or computer to access the internet, in order to not involve the office staff unless a dollar amount threshold is exceeded. For more information on the VPO Process, please visit the BuilderMT website at www.buildermt.com or e-mail info@buildermt.com.

