

BuildPro Mobile V4

User Guide



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Support for this product is available from the Customer Care Center and online.

| | |
|-------------------------------|---|
| Telephone | 877-508-2547 Option 4 |
| After Hours Telephone | 877-508-2547 or 972-728-8100 |
| Hours | You can reach the Customer Care Center Monday through Friday, 7 a.m. to 7 p.m., Central Standard Time. |
| Email | support@hyphensolutions.com |
| Mail | Hyphen Solutions™, Ltd. 16479 N. Dallas Parkway, Suite 400 Addison, TX 75001 |
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Use This Guide

This document is written for advanced users and assumes familiarity with the application's interface. This document is a training guide and is designed to be used with interactive training as given by a certified Hyphen Solutions consultant. Use this guide in conjunction with the training and the Help video to answer your basic questions. For questions beyond the scope of this document, contact the [Customer Care Center](#).

Chapter 1 BuildPro Mobile V4 Overview

Version 4 of the BuildPro Mobile App User Guide

Objectives

After reading this chapter, you should have a basic understanding of:

- The new updates available in V4 of the BuildPro Mobile App and how to use them

Overview

The BuildPro Mobile app is an iPad application that allows BuildPro users to manage tasks in the field. With Version 4 of the BuildPro app, users now have more functionality to help manage their accounts more effectively in a mobile environment.

Updates

The following changes have been made to the BuildPro Mobile App:

- Allow user to Undo Completion of a task
- Select a Vendor for TBD Tasks
- View All Task Statuses
- Remove Exceptions
- View Order History
- Ability to choose “today’s date” on Calendar picker
- Change Start Date on Reminders
- Add Picture to Doc Management
- View Job Notes
- Add Defects
- Change Supplier on EPO
- Mark Ready / Not Ready for EPOs
- New Settings Page
- Manage Jobs in Active, Inventory, and Warranty Status

Chapter 2 Undo Complete Task

Version 4 of the BuildPro Mobile App User Guide

Overview

After a user completes a task, they will now see an “Undo Complete” button which will allow them to undo the completion of a task. This button will be used most often when a task has been completed by accident.

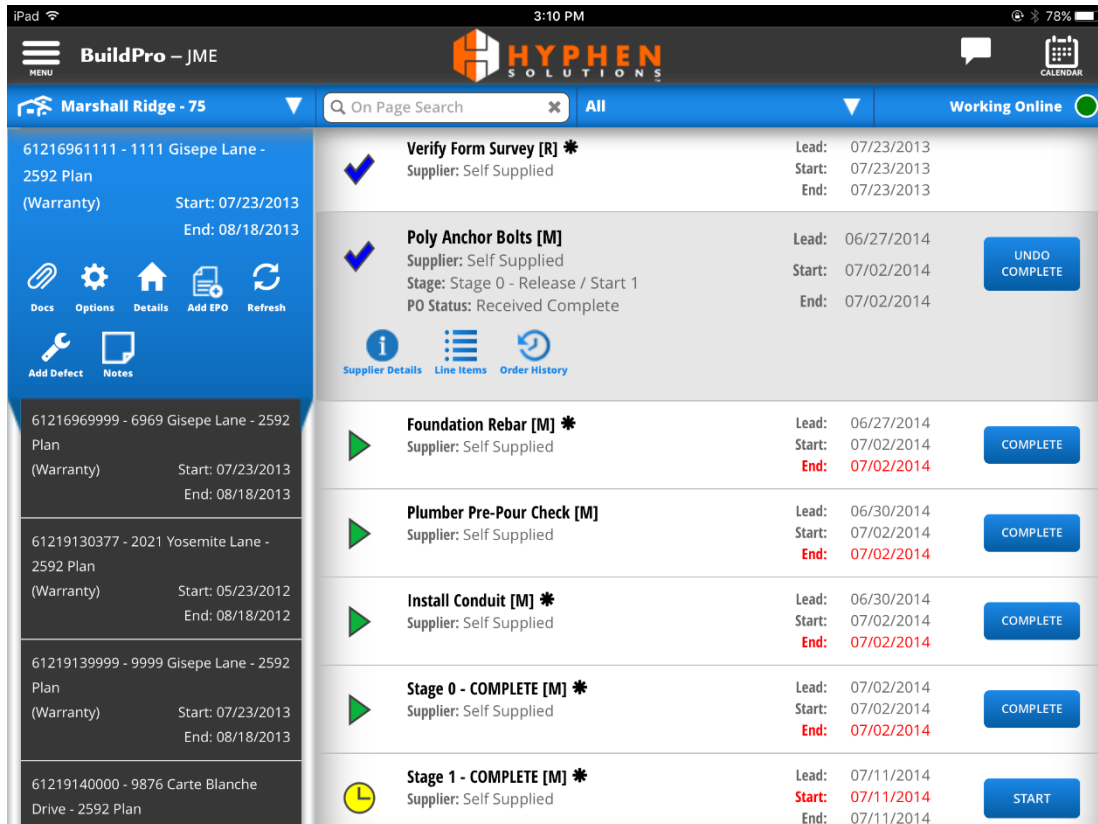
Details

The “Undo Complete” button will be available to undo a completion in the mobile app. Tapping the button will trigger a message asking if the user is sure they want to under the completion of the task. Selecting yes will set the task status back to in progress.

A note is required to undo completion and in the mobile app, the note will be defaulted to “Task completion undone via mobile app by ‘Username’ and Date/Time.”

This functionality will work while “Working Offline.”

Users will not be able to undo completion of a task if it has been exported. If an exported date exists for the task, the button will not be available.



Chapter 3 Choose TBD Vendor

Version 4 of the BuildPro Mobile App User Guide

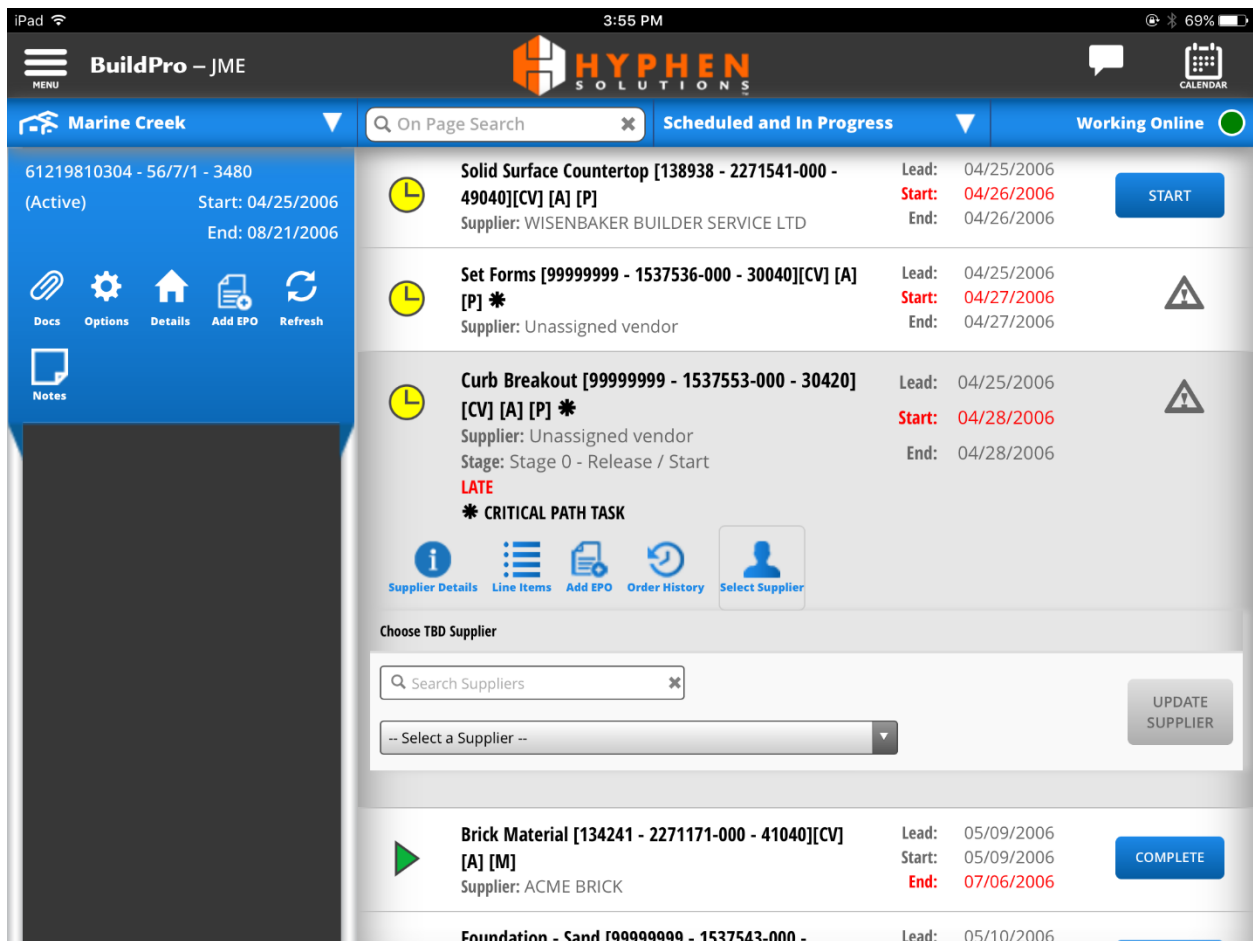
Overview

If a supplier has yet to be assigned to a task, the TBD indicator is set. New functionality in the BuildPro Mobile app will allow users to update and select a supplier on TBD tasks. This feature was previously only available in the classic web pages.

Details

When a TBD Task container is expanded there will be a new icon available with the label “Select Supplier.” Tapping the icon will reveal a text search box and a drop down to select a valid supplier. The search text box will filter and limit the results in the drop down.

Next to the supplier search text box and drop down is a new “Update Supplier” button which becomes enabled once a supplier has been selected.



Chapter 4 View All Task Statuses

Version 4 of the BuildPro Mobile App User Guide

Overview

Add new filter options that allows the user to view more task statuses in the App.

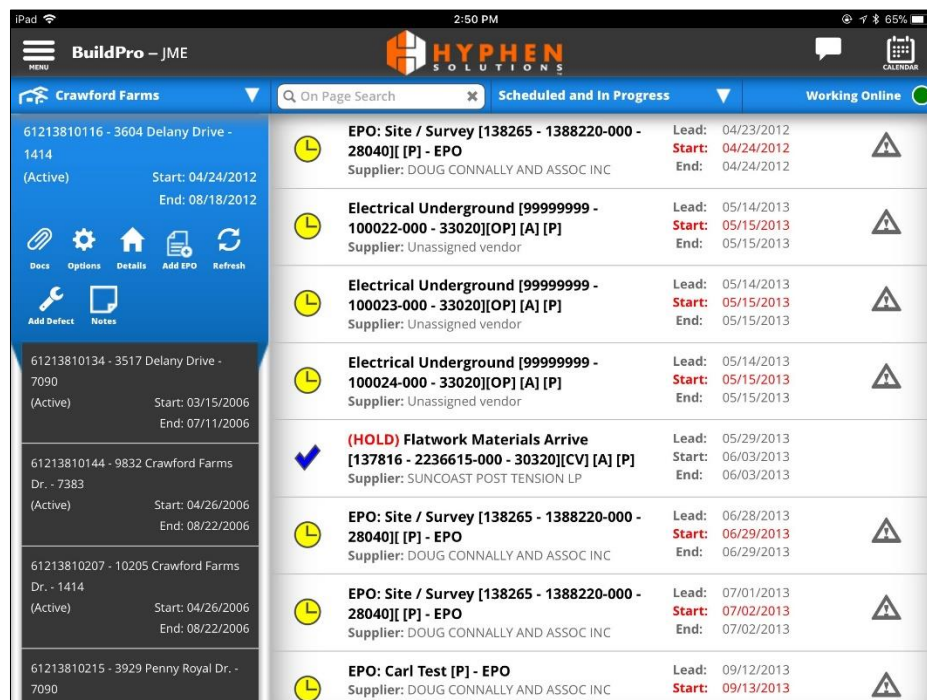
Details

The new task status filter changed from a button selection to a drop down to allow for more options. In the drop down will contain the following options:

- All
- Scheduled and In Progress (default selection)
- Late
- To Do Today
- Late and To Do Today

When the “All” option is selected, cancelled tasks will show in the task list. Users will only be able to add Defects and Create EPOs for cancelled tasks. All other buttons will be hidden on cancelled tasks.

Tasks that have been completed with exception will always show, regardless of the selected filter along with the text (Hold) in front of the task name.



Retaining Filter Selection

Previously, when the user switched jobs after selecting a new task status filter other than the default, the task status filter is lost. In Version 4 of the BuildPro App, the task filter selection will be retained as the user navigates between different jobs. The filter selection will also remain when the page is refreshed.

Chapter 5 Order History

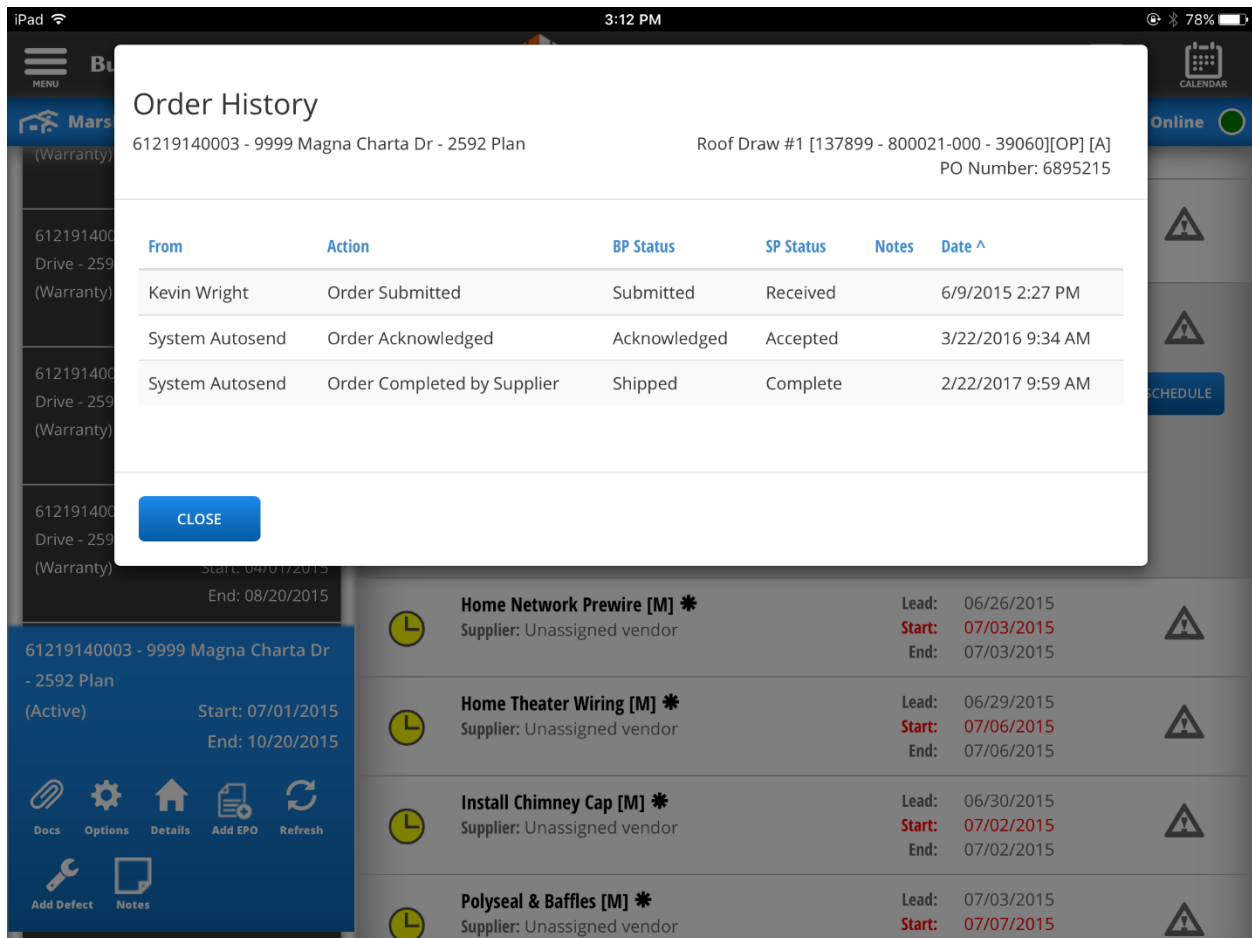
Version 4 of the BuildPro Mobile App User Guide

Overview

A new icon in the task container will let users view the order history information for a task.

Details

A new icon was added to the task container that when tapped opens a popup containing order history information. The popup shows the same information displayed on the History tab of the Order Detail page in BuildPro.



Chapter 6 Job Notes

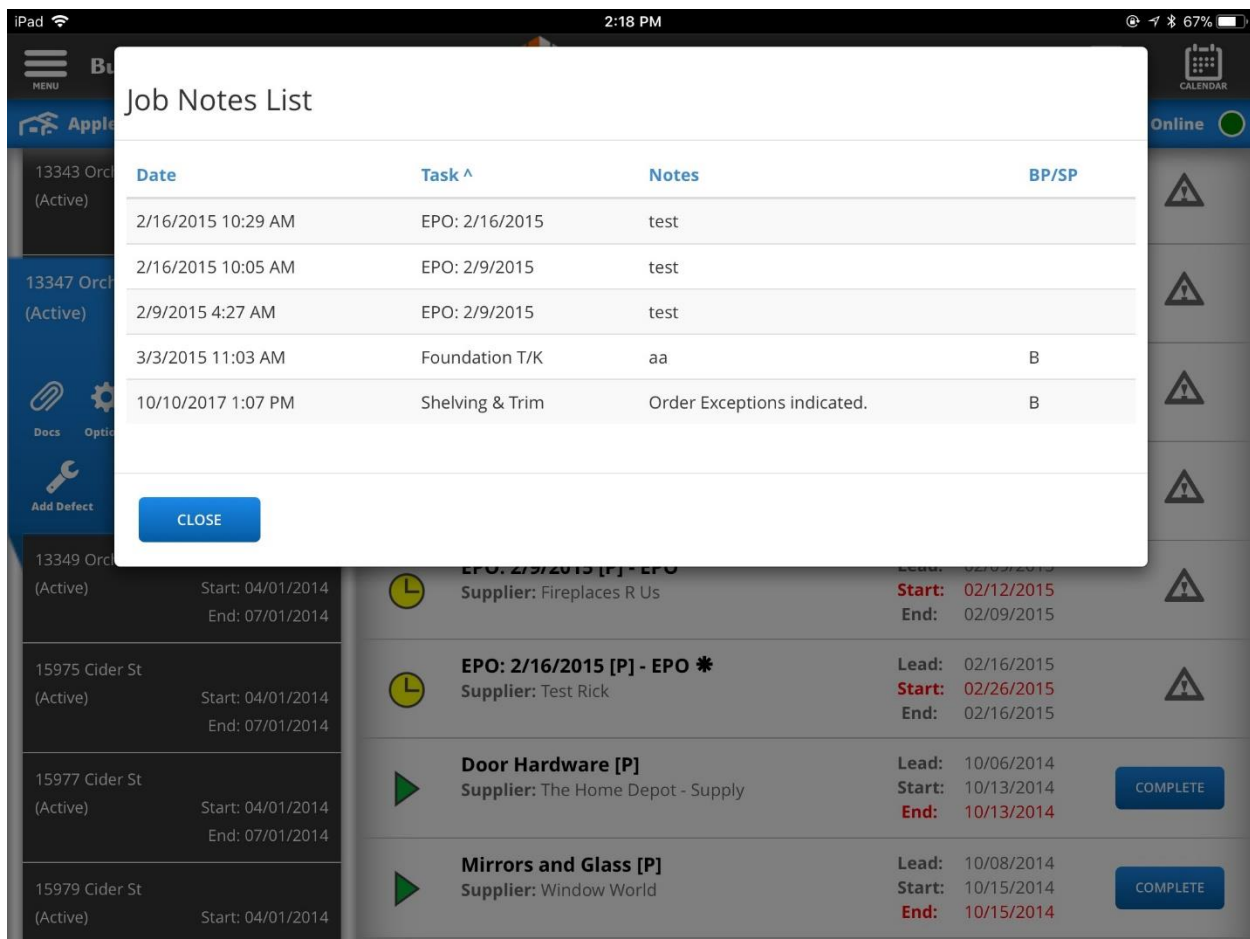
Version 4 of the BuildPro Mobile App User Guide

Overview

A new icon in the job container will let users view the Job Notes.

Details

A New icon will allow users to view the Job Notes in a popup. This popup displays the same information accessed via the Notes link in JME and To Do List. Users will also be able to sort the job notes by all columns in the grid.

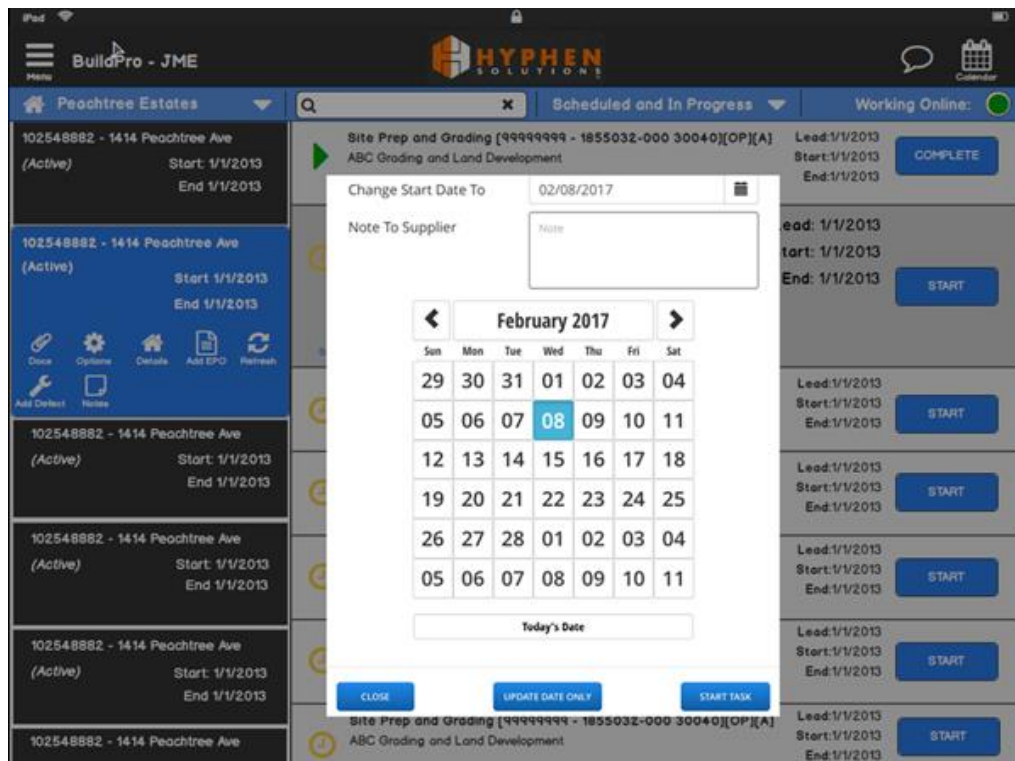


Chapter 7 Today's Date

Version 4 of the BuildPro Mobile App User Guide

Overview

The Date Picker has a new choice for “Today’s Date” (button) that will navigate to the current date.



Chapter 8 Change Start Date on Reminder Tasks

Version 4 of the BuildPro Mobile App User Guide

Overview

Allow users to modify the Start Date on Reminder Tasks.

The screenshot displays the BuildPro mobile app interface on an iPad. The top status bar shows 'iPad', signal strength, '8:28 AM', and '15%' battery. The app header includes the 'BuildPro - JME' title, the 'HYPHEN SOLUTIONS' logo, and a 'CALENDAR' icon. Below the header, there's a navigation bar with 'Apple Tree Farms' (selected), 'On Page Search', 'Scheduled and In Progress', and 'Working Online'. The main content area lists tasks with their details and completion status.

| Task Name | Supplier | Lead | Start | End | Status |
|----------------------------|-------------------------|------------|------------|------------|----------|
| Interior Clean [P] | Flooring Supply | 10/13/2014 | 10/16/2014 | 10/16/2014 | COMPLETE |
| Wood Flooring [P] | The Home Depot - Supply | 10/03/2014 | 10/17/2014 | 10/20/2014 | COMPLETE |
| Appliances [P] | The Home Depot - Supply | 10/08/2014 | 10/22/2014 | 10/22/2014 | COMPLETE |
| Interior Trim Labor II [P] | Flooring Supply | 10/16/2014 | 10/21/2014 | 10/21/2014 | COMPLETE |
| Carpet [P] | The Home Depot - Supply | 10/16/2014 | 10/23/2014 | 10/23/2014 | COMPLETE |
| Punchout [M] | Flooring Supply | 10/23/2014 | 10/24/2014 | 10/24/2014 | COMPLETE |
| Customer Walkthrough [R] | Self Supplied | 10/27/2014 | 10/28/2014 | 10/28/2014 | COMPLETE |

The 'Customer Walkthrough [R]' task is highlighted with a yellow clock icon and the text 'LATE'. Below the task list, there are links for 'Supplier Details' and 'Order History'.

Chapter 9 Add Picture to Doc Management

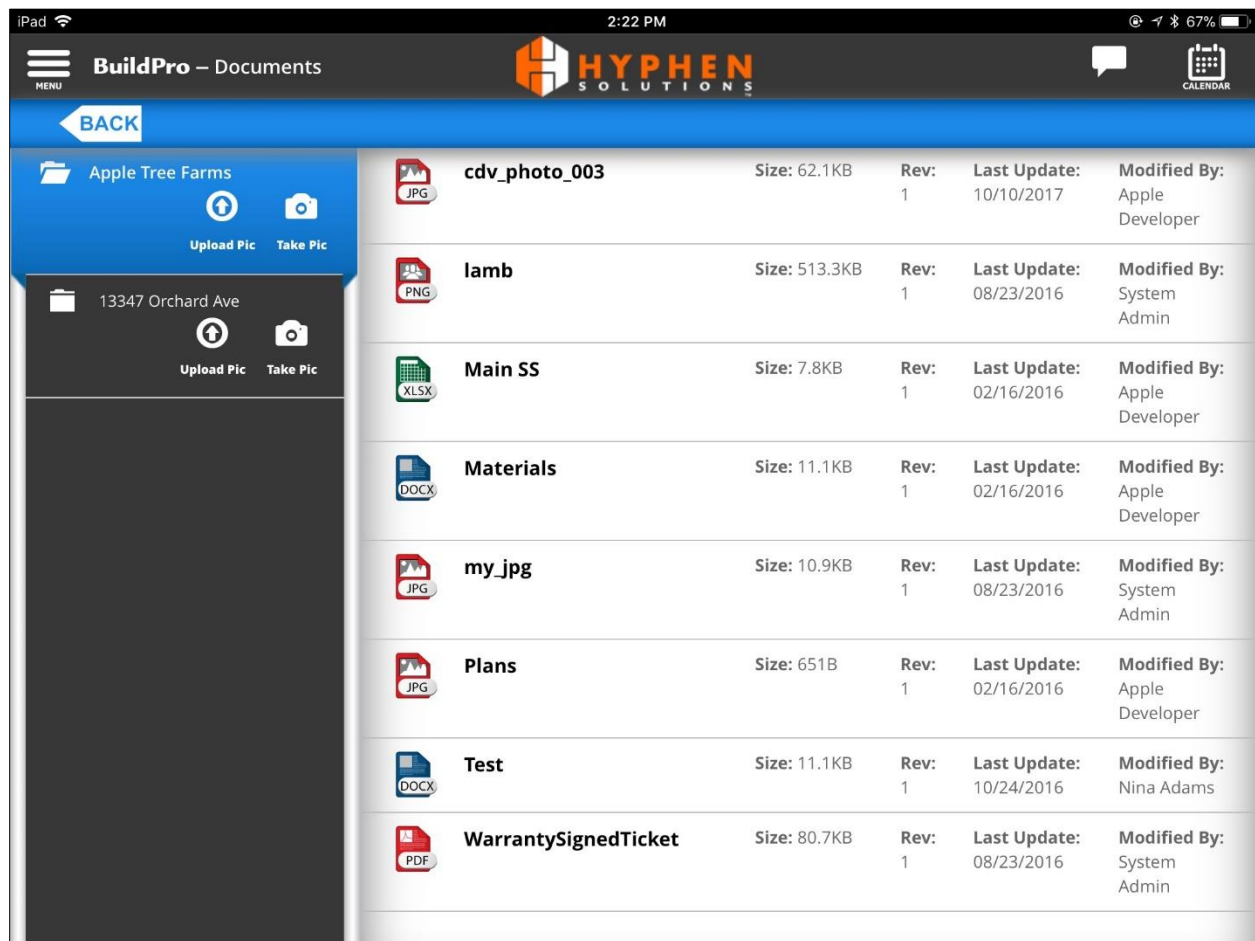
Version 4 of the BuildPro Mobile App User Guide

Overview

Add functionality to allow users to upload pictures to document management

Details

Add two icons to each folder in document management. The “Upload Pic” icon launches the photo library on the user’s device and allows them to select photos for upload. The “Take Pic” icon allows users to take a picture using their device to be uploaded into document management.



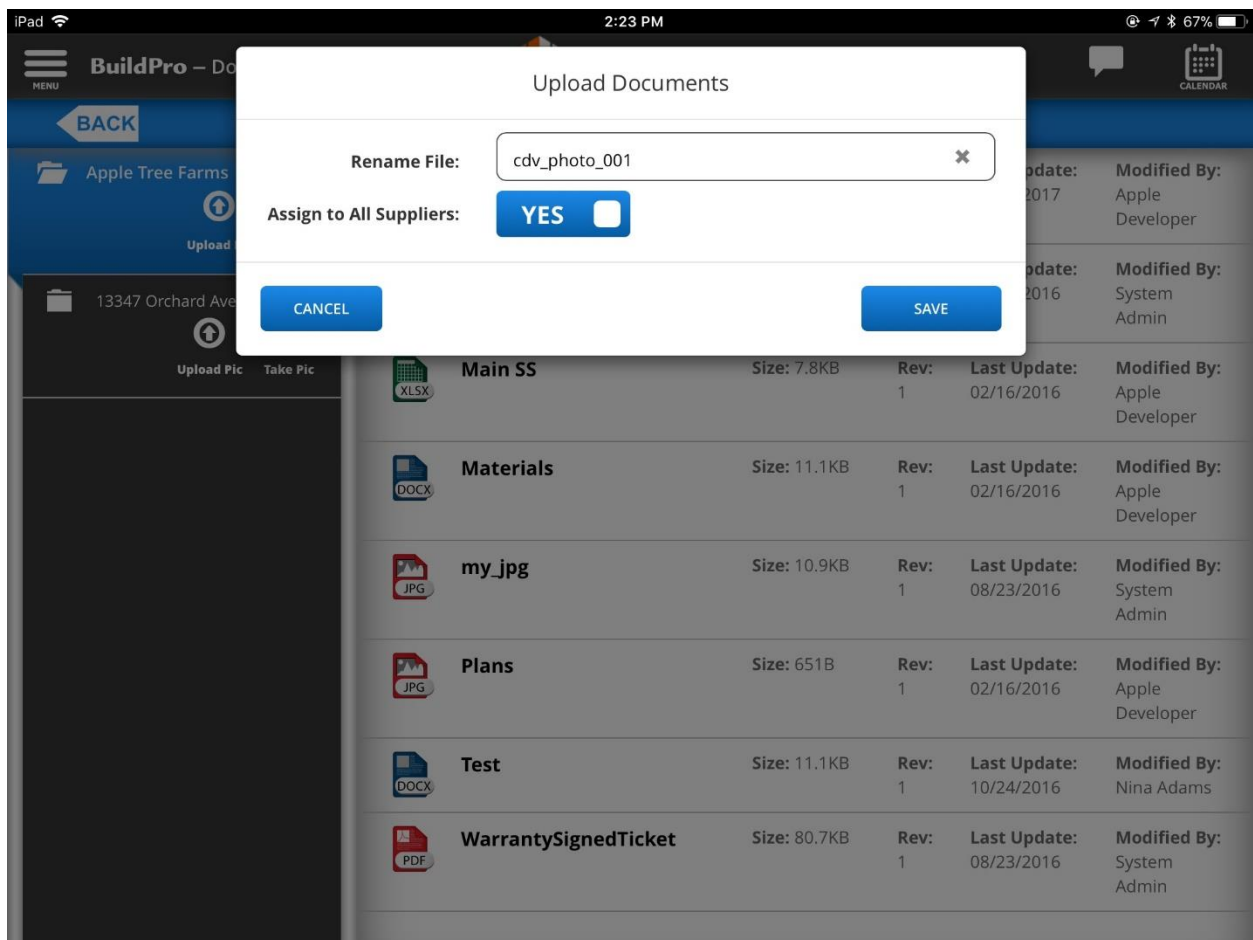
Renaming File

The file name for uploaded pictures is defaulted when the photo is selected or taken. After the user selects a picture from their device to be uploaded, they will be prompted to update the file name. The

user is not required to update the file name, but updating the name allows the file to be uploaded with a more recognizable title.

Assign to All Suppliers

In the same popup to rename the file, the user has an option to assign the document to all suppliers. The toggle will be defaulted to Yes which will let all suppliers view the uploaded file.



Chapter 10 Add Defect

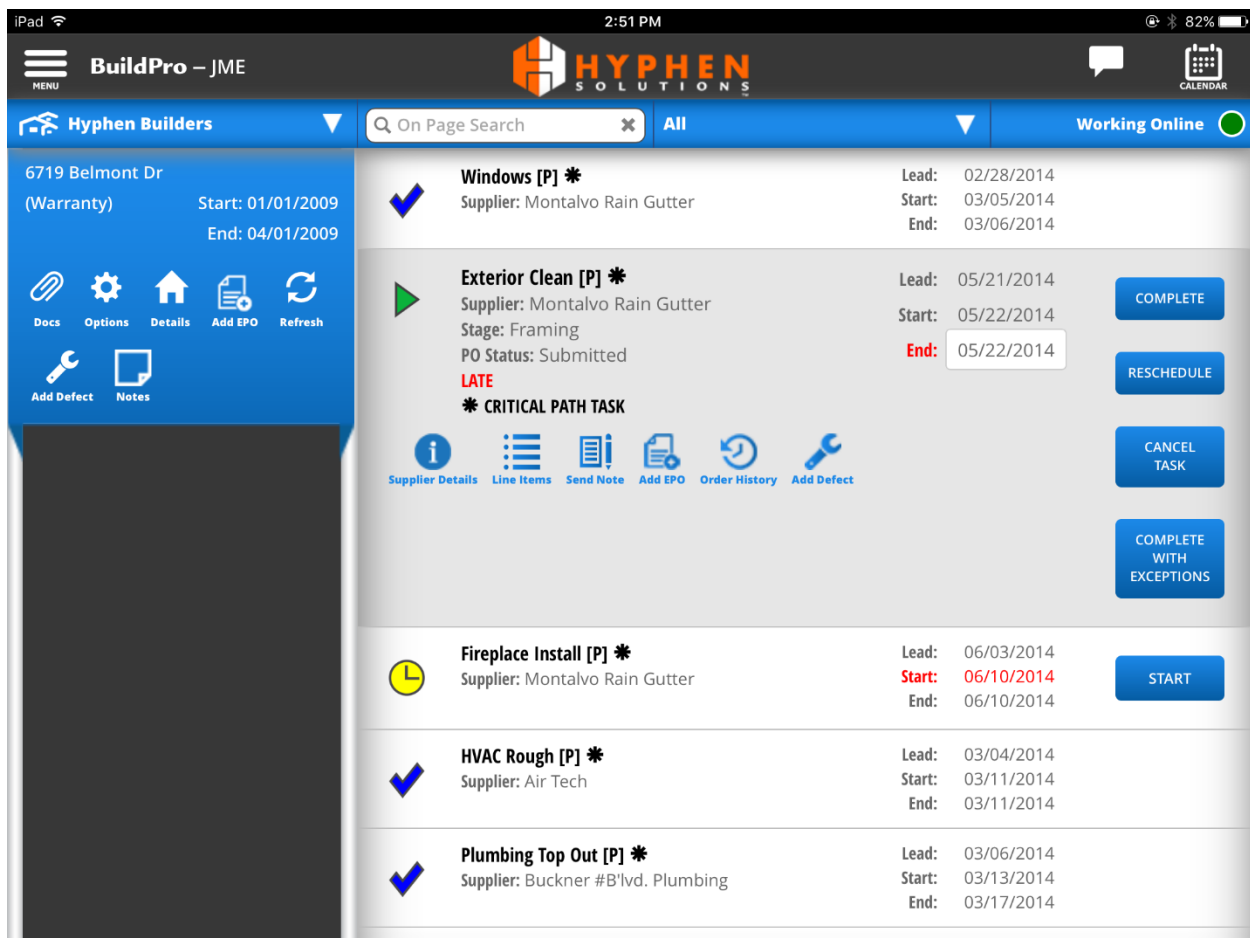
Version 4 of the BuildPro Mobile App User Guide

Overview

Users will now be able to add defects via the BP Mobile App.

Details

If a company is utilizing the defect modules and a user has the proper rights to add a defect, an icon will be displayed in the task container and the job container. Both links will navigate to the new Add Defect page.



Full Defect

The Full defect page is for companies using the regular inspections module (167). Users will need to fill out all required fields to save the defect.

The screenshot shows the 'BuildPro - Add Defect' screen on an iPad. The top status bar shows 'iPad', signal strength, time '2:31 PM', and battery '67%'. The app header includes a menu icon, the title 'BuildPro - Add Defect', the 'HYPHEN SOLUTIONS' logo, a chat icon, and a calendar icon. Below the header, a blue bar displays the address '12797 Green Apple Dr' and a 'Working Online' status with a green dot. The main form area contains several fields: 'Category:*' (dropdown), 'Sub-Category:*' (dropdown), 'Description:*' (dropdown), 'Defect #:' (text), 'Assigned Supplier:*' (dropdown), 'Responsible Supplier:*' (dropdown), 'Regulatory Insp:' (checkbox labeled 'NO'), 'Due Date:*' (date picker showing '10/19/2017'), 'Inspected Date:' (text showing '10/18/2017'), 'Pictures:' (image gallery with 'Remove Selected', 'Upload Pic', and 'Take Pic' buttons), and 'Notes:' (text area). At the bottom, a blue bar shows 'Point of Contact*:' with a plus icon to add a new contact. Action buttons at the top of the form include 'Cancel Defect', 'Save Defect', 'Save and Add EPO', and 'Save and New'.

Task

If the user navigates to the Defect page via the task container, the task drop down will be defaulted to the task they came from with the supplier dropdown defaulted to the applicable supplier. If the user navigates to the defect page via the job container, the user will be required to select a supplier.

Pictures

Users can upload pictures when adding the defect either by taking a picture using their device or uploading photos already in their camera roll. A thumbnail of the selected photo will show on the screen. Users can only upload 5 pictures per defect. Photos can be deleted by selecting the thumbnail and clicking "remove selected" button.

Point of Contact

If the Point of Contact module is turned on, the defect page will have additional fields allowing the user to select a point of contact to notify upon defect creation. The new section also allows users to add a new

point of contact and copy themselves on the notification email. At least one contact is required to be selected to save the defect.

Slim Defect

For companies utilizing the Slim Defect Module (315), the defect page will be a paired down version of the defect page. It is important to note that additional back end set up is required for the slim defect page to function as desired.

The screenshot displays the 'BuildPro - Add Defect' mobile application interface on an iPad. The top status bar shows 'iPad', signal strength, time '3:12 PM', and battery level '78%'. The app's header bar includes a 'MENU' icon, the title 'BuildPro - Add Defect', the 'HYPHEN SOLUTIONS' logo, a chat icon, and a 'CALENDAR' icon. Below the header, a blue bar displays the address '61216961111 - 1111 Gisepe Lane - 2592 Plan' and a 'Working Online' status with a green indicator. The main form area contains several input fields and buttons:

- Supplier*:** A dropdown menu with the text '-- Select a Supplier --'.
- Due Date:** A date input field showing '9/11/2017' with a calendar icon.
- Task*:** A dropdown menu with the text '-- Select a Task --'.
- Inspected Date:** A date input field showing '9/8/2017'.
- Location*:** A dropdown menu with the text '-- Select a Location --'.
- Pictures:** A large empty rectangular box for image uploads.
- Critical:** A toggle switch currently set to 'NO'.
- Remove Selected:** A button located below the 'Pictures' box.
- Upload Pic:** A button with an upward arrow icon.
- Take Pic:** A button with a camera icon.
- Notes*:** A large empty rectangular text area.

At the bottom of the form, there are four buttons: 'Cancel Defect' (blue), 'Save Defect' (grey), 'Save and Add EPO' (grey), and 'Save and New' (grey).

Chapter 11 New Setting Page

Version 4 of the BuildPro Mobile App User Guide

Overview

A new Settings selection was added to main menu. Tapping the settings button navigates the user to the new settings page.

Details

On the settings page users can choose how they would like to sort tasks in JME. They can sort by stage and by task lead date, start date or task sequence. Changing the sort choices will only affect how the app is sorted and will not change how the web JME page is sorted.

Users can select to display/include any combination of jobs in Active, Warranty or Inventory status.

The screenshot shows the 'BuildPro - Settings' page on an iPad. The top status bar indicates 'iPad', signal strength, time '2:35 PM', and battery level '67%'. The app header includes a 'MENU' icon, the title 'BuildPro - Settings', the 'HYPHEN SOLUTIONS' logo, a chat icon, and a 'CALENDAR' icon. A blue bar at the top right says 'Working Online' with a green status indicator.

The main content area is divided into two sections:

- Sort Tasks in JME**:
 - By Stage:** YES ☐
 - By Task:** Lead Date ☒ Start Date ☐ Task Sequence ☐
- Include Jobs in These Statuses**:
 - Active:** YES ☐
 - Warranty:** YES ☐
 - Inventory:** YES ☐

At the bottom, a note states: 'Setting changes update automatically.'

Chapter 12 Miscellaneous Update

Version 4 of the BuildPro Mobile App User Guide

Overview

Miscellaneous updates available in V4 of the BuildPro Mobile App.

Change Supplier on EPO

A new application function is available that will allow users to modify the supplier on an EPO created in the Mobile App. When the user with this new role navigates to the create EPO page, the supplier field will be a drop-down box where the user can select a supplier from the drop down. Please note the supplier cannot be changed for SP EPOs.

BuildPro – Add EPO

61219130377 - 2021 Yosemite Lane - 2592 Plan

Working Online

Cancel EPO Create EPO Create EPO and Mark Ready

Task Name:* EPO: Warranty Task 9/8/2017

Supplier:* Search Suppliers ABEL D ESPINOZA

Job Stage:* Stage 0 - Release / Start 1

Supplier Start Date:* 9/9/2017

Cost Code:* Search Cost Codes 31080-12200 - Plumbing - Trim/Finis

EPO Reason:* -- Select an EPO Reason --

EPO Notes:
(to backoffice)

Supplier Instructions:

| Add Item Quantities | | | | | |
|---------------------|-----|------------|-----------|----------|------------|
| Product | Qty | Price Each | Sell Unit | Conv Qty | Unit Price |
| 1 | 0 | \$200.00 | EA | 1.000 | \$200.00 |
| 2 | | | | | |

Enter Additional Items Freeform

EPO Supplier Start Date

Update the “Start Date” label to say “Supplier Start Date”. See picture above.

Mark Ready Button for EPOs

In the task pane, display a Mark Ready (or Mark Not Ready) button available for EPOs. The Mark Ready button will be displayed when:

- The task is an EPO
- EPO is Marked Not Ready
- Task Status is scheduled
- EPO is not approved
- EPO has not been exported or reconciled

The Mark Not Ready button should only be displayed when

- The Task is an EPO
- EPO is Marked Ready
- Task Status is scheduled
- EPO is Approved but not exported or reconciled

The screenshot shows the BuildPro mobile app interface on an iPad. The top bar displays the app name 'BuildPro - JME' and the company logo 'HYPHEN SOLUTIONS'. The main content area lists tasks for 'Marshall Ridge - 75'. The tasks are:

- Stage 1 - COMPLETE [M] *
Supplier: Self Supplied
Lead: 07/06/2015
Start: 07/06/2015
End: 07/06/2015
Button: START
- Stage 2 - COMPLETE [M] *
Supplier: C AND B ELECTRIC
Lead: 07/01/2015
Start: 07/01/2015
End: 07/01/2015
Button: START
- Stress Cables [M] *
Supplier: Unassigned vendor
Lead: 07/07/2015
Start: 07/15/2015
End: 07/15/2015
Button: [Warning Icon]
- EPO: Roof Draw #1 [137899 - 800021-000 - 39060]
[OP [P] - EPO
Supplier: C AND B ELECTRIC
Lead: 06/04/2015
Start: 06/10/2015
End: 06/10/2015
Button: [Warning Icon]
- EPO: Roof Draw #1 [137899 - 800021-000 - 39060][OP [P] - EPO
Supplier: C AND B ELECTRIC
Stage: Stage 3 - Framing Complete
LATE
Lead: 06/24/2015
Start: 06/30/2015
End: 07/01/2015
Button: MARK READY
- Roof Draw #1 [137899 - 800021-000 - 39060][OP [A] [P] *
Supplier: C AND B ELECTRIC
Lead: 06/24/2015
Start: 06/30/2015
End: 07/01/2015
Button: [Warning Icon]
- Home Network Prewire [M] *
Lead: 06/26/2015
Start: 07/02/2015
End: 07/02/2015
Button: [Warning Icon]

The bottom navigation bar includes icons for Docs, Options, Details, Add EPO, Refresh, Add Defect, and Notes.

EPO Supplier Order # Field

Add a Supplier Order # field to the Add EPO Screen. This functionality is modularized and may not appear for all users.

Carrier 100% 2:52 PM iPad Air 2 – iOS 10.2 (14C89)

BuildPro – Add EPO **HYPHEN SOLUTIONS** Working Online

101 Main St.

Cancel EPO Create EPO Create EPO and Mark Ready

Task Name:* EPO: 8/3/2017

Supplier:* Search Suppliers X -- Select a Supplier --

Job Stage:* -- Select a Job Stage --

Supplier Start Date:* 8/4/2017

Cost Code:* Search Cost Codes X -- Select a Cost Code --

EPO Reason:* -- Select an EPO Reason --

EPO Notes: (to backoffice) Note

Supplier Instructions: Instructions

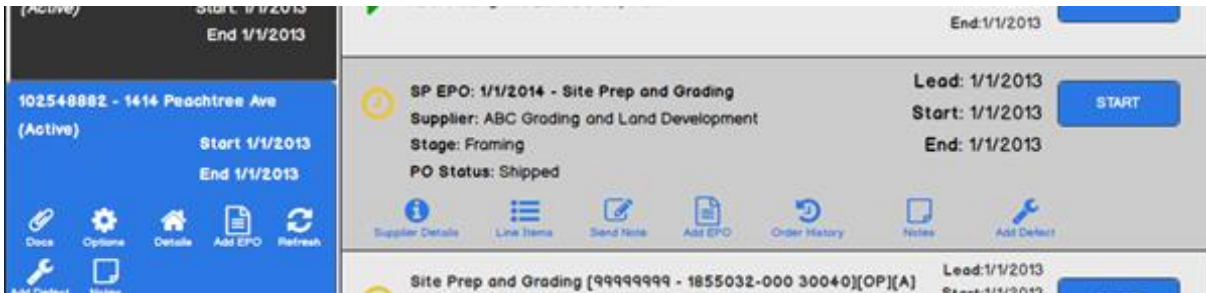
Supplier Order #:

Enter Freeform Items

| SKU | Description | Option | Quantity | Unit Price |
|-----|-------------|--------------|----------|------------|
| | | -- Select -- | | |
| | | -- Select -- | | |

Supplier Generated EPOs

Previously, Supplier created EPOs (SP-EPOs) were withheld from the BuildPro App. In Version 4 of the BuildPro App, SP EPOs will show in JME similarly to a regular EPO, with the additional note that it is an SP EPO.



If you have questions beyond the scope of this document, contact the [Customer Care Center](#).