



BIDBUILD TRAINING · ORIENTATION

Dashboard Overview and Navigation

A companion to the video walkthrough. What every section of the BidBuild dashboard tells you, and how to move through the app from the side menu.

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OVERVIEW

One screen, five questions

The dashboard is a single scrolling page. Each section answers a different question about the business, and every number on it obeys the date range and filters you set at the top of that section.

DASHBOARD · ACTIVITY · MENU

WHAT EACH SECTION ANSWERS

SECTION	ANSWERS
Updates	What has just happened — your most recent leads, jobs, and clients.
Messages & Logs	What has been said and recorded across every lead and job.
Lead Activity	Are we generating and converting enough opportunity?
Sales Budget & Income	Are we selling what we planned to sell this year?
Job Activity	How much work is moving, and how fast?
Financial Activity	What is the money doing — income, expense, profit, contingency.

BEFORE YOU READ THE NUMBERS

- Each section has its own **date range**. Set it before comparing anything.
- Charts can be viewed by **day, month, or year**.
- Filters at section level change the totals below them — including the year-to-date column.

WHY IT MATTERS

Most "the dashboard looks wrong" questions are a date range or a filter left over from the last time someone used the screen. Check those two things first, before assuming the data is off.

PART ONE

Reading the dashboard

Top to bottom, in the order the page scrolls.

SECTION 01 Updates — leads, jobs, and clients

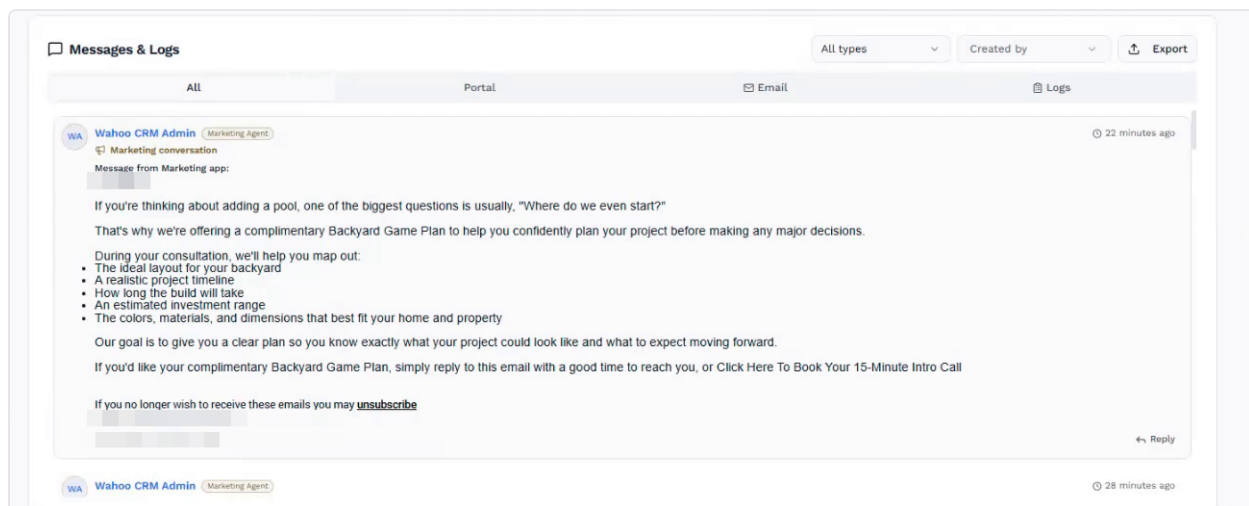
Three cards sit at the top of the page: **Current Leads**, **Current Jobs**, and **Current Clients**. Each lists your most recent records, and the arrow on the card opens the full list.



DASHBOARD · UPDATES

SECTION 02 Messages & Logs

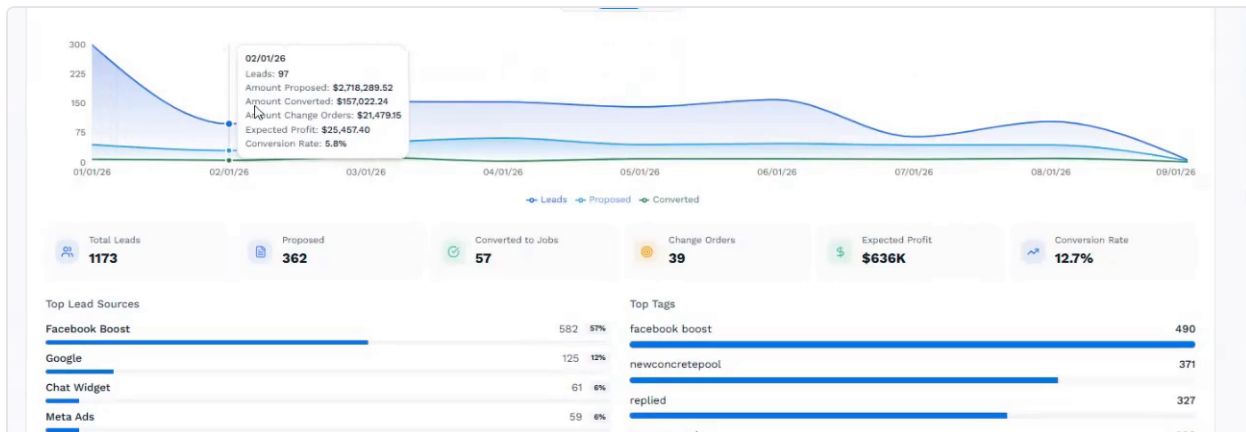
Every message tied to a lead sits here alongside the job logs your team has recorded. Use the tabs to narrow to **Portal**, **Email**, or **Logs**, filter by type or author, and scroll the feed to review recent activity without leaving the dashboard.



DASHBOARD · MESSAGES & LOGS

SECTION 03 Lead Activity — the graph

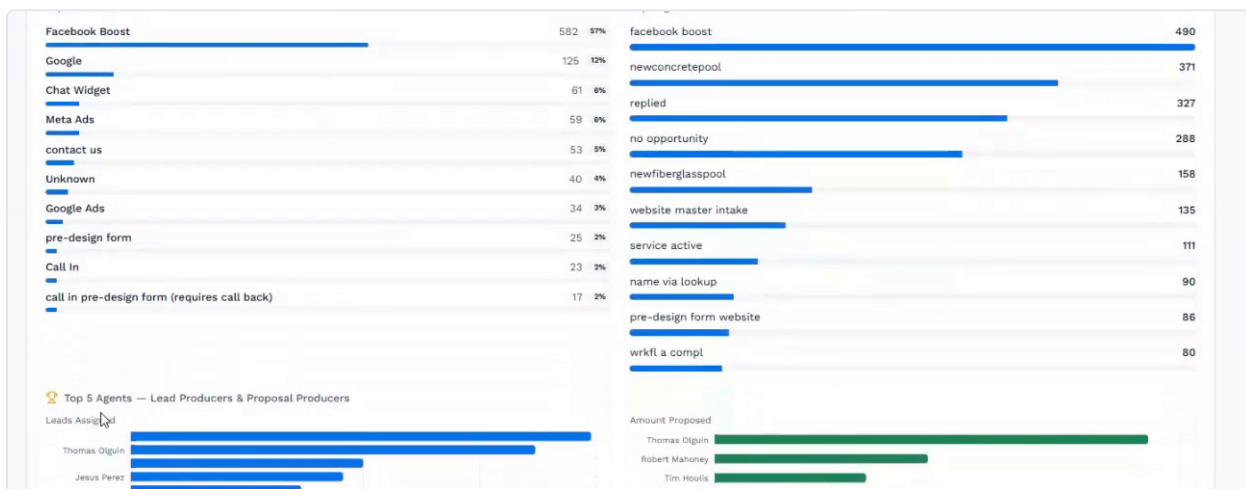
The graph plots leads over your chosen date range, by **day, month, or year**. The row beneath it totals leads, amount proposed, amount converted, change orders, expected profit, and your **conversion rate**.



LEAD ACTIVITY · TREND AND TOTALS

SECTION 04 Lead Activity — the detail behind it

Below the graph, the same period is broken out by **top lead sources**, **top tags**, the agents with the most leads assigned and proposed, the agents selling the most jobs, and **top divisions** by amount proposed.



LEAD ACTIVITY · SOURCES, TAGS, AGENTS

SECTION 05 Sales Budget & Income

Plan a full year here. In the **budget** field, enter what you expect to sell each month for each division configured in BidBuild. The **actual** column fills in automatically when a proposal is accepted and converted to a job, and the row underneath shows the difference.

< 2026 > Income Source Sales Agent Tags													
Income Source	January, 2026		February, 2026		March, 2026		April, 2026		May, 2026		June, 2026		Budget
	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	
CONCRETE CONSTRUCTION	\$20,000	\$442,878.66	\$0	\$121,077.63	\$500,000	\$613,850.20	\$1,000,000	\$219,827.00	\$1,000,000	\$694,761.54	\$1,000,000	\$609,508.16	\$1,000,000
FIBERGLASS CONSTRUCTION	\$500,000	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0
POOL SERVICE	\$0	\$0.00	\$0	\$35,944.61	\$10,000	\$0.00	\$10,000	\$0.00	\$10,000	\$0.00	\$10,000	\$0.00	\$10,000
POOL REMODEL	\$0	\$0.00	\$0	\$0.00	\$100,000	\$110,651.32	\$100,000	\$0.00	\$50,000	\$24,990.80	\$50,000	\$32,921.73	\$50,000
Total	\$520,000.00	\$442,878.66	\$0.00	\$157,022.24	\$610,000.00	\$724,501.52	\$1,110,000.00	\$219,827.00	\$1,060,000.00	\$719,752.34	\$1,060,000.00	\$542,429.89	\$1,060,000.00

SALES BUDGET & INCOME · MONTHLY GRID

SECTION 06 Year-to-date totals

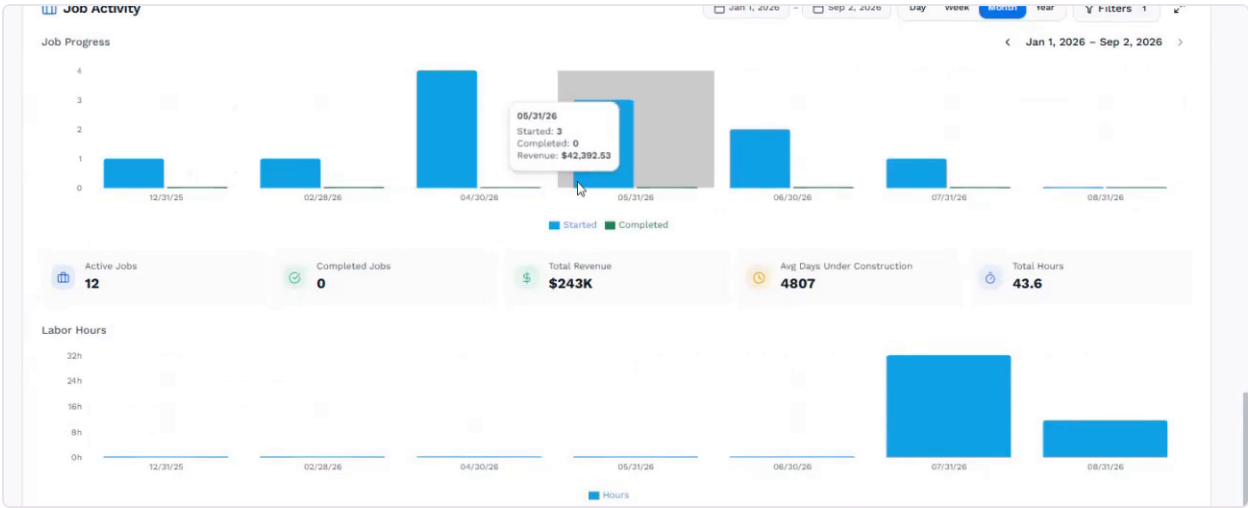
Scroll the grid to the right for the **Total** column — the year to date position for every division. It responds to the same date range and filters as the months beside it.

< 2026 > Income Source Sales Agent Tags													
July, 2026	August, 2026		September, 2026		October, 2026		November, 2026		December, 2026		Total		Budget
	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	
CONCRETE CONSTRUCTION	\$384,345.73	\$1,000,000	\$946,172.56	\$1,000,000	\$0.00	\$1,000,000	\$0.00	\$500,000	\$0.00	\$500,000	\$0.00	\$8,520,000.00	\$3,932,221.49
FIBERGLASS CONSTRUCTION	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$500,000.00	\$0.00
POOL SERVICE	\$0.00	\$10,000	\$0.00	\$10,000	\$0.00	\$5,000	\$0.00	\$5,000	\$0.00	\$5,000	\$0.00	\$85,000.00	\$35,944.61
POOL REMODEL	\$0.00	\$75,000	\$0.00	\$100,000	\$0.00	\$100,000	\$0.00	\$100,000	\$0.00	\$100,000	\$0.00	\$825,000.00	\$168,562.86
Total	\$384,345.73	\$1,085,000.00	\$946,172.56	\$1,110,000.00	\$0.00	\$1,105,000.00	\$0.00	\$605,000.00	\$0.00	\$605,000.00	\$0.00	\$9,930,000.00	\$4,136,729.95

SALES BUDGET & INCOME · TOTALS

SECTION 07 Job Activity

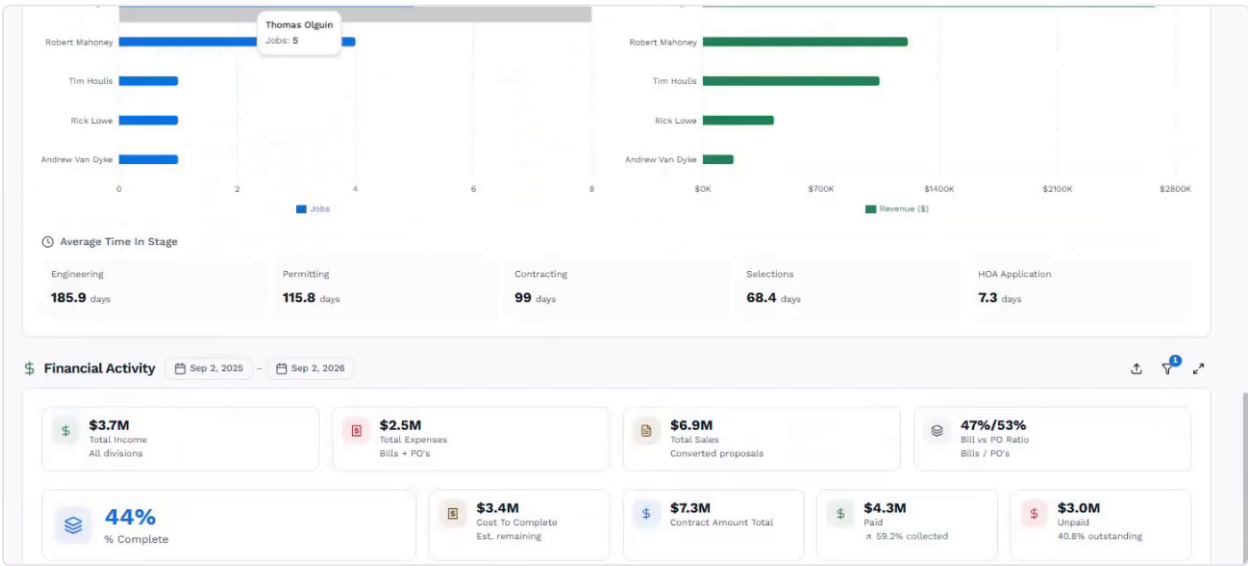
Jobs started and finished month by month, plus **active jobs**, **completed jobs**, **total revenue**, average days under construction, and total hours.



JOB ACTIVITY · PROGRESS AND TOTALS

SECTION 08 Labor, stages, and project managers

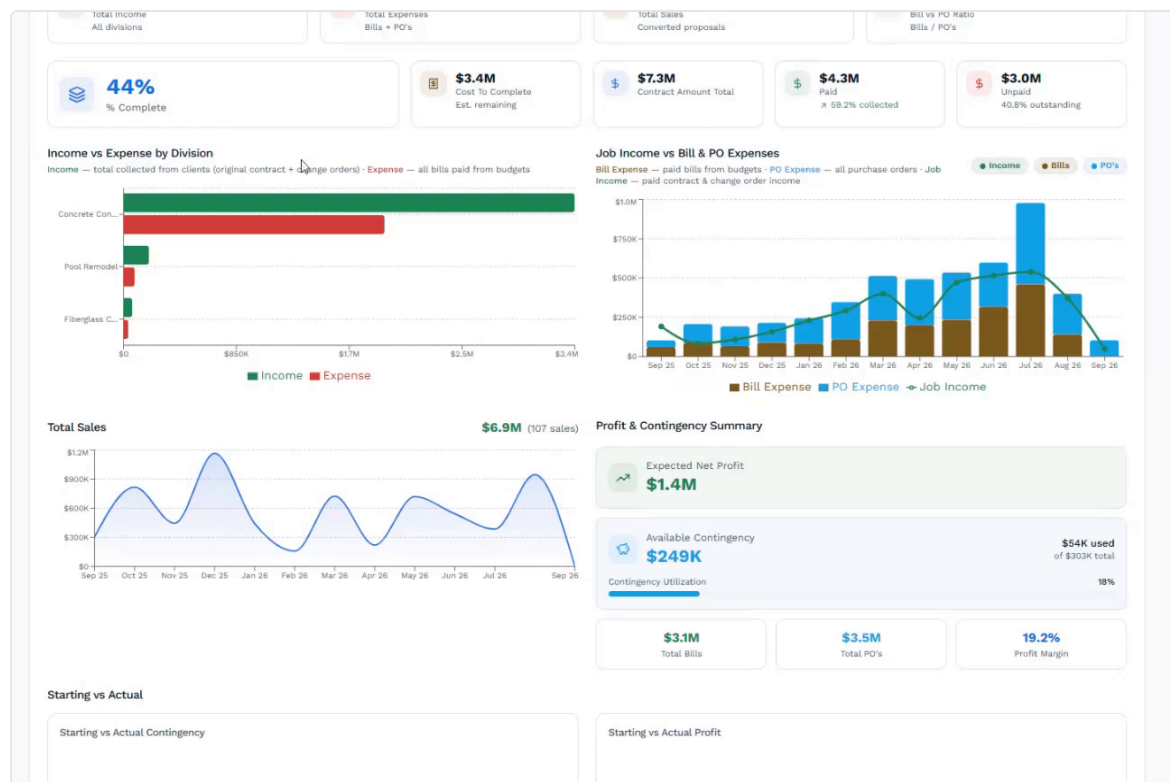
Keep scrolling for **labor hours**, **jobs by stage**, upcoming to-dos, **top producing project managers**, and **average time in stage** — the fastest read on where work is piling up.



JOB ACTIVITY · STAGES AND MANAGERS

SECTION 09 Financial Activity

The last section on the page. Total income and expenses, total sales, the **bills to purchase order ratio**, percent complete, cost to complete, contract totals, paid and unpaid amounts, income and expense by division, job income against bill and PO expense, expected net profit, and **available contingency**.



DASHBOARD · FINANCIAL ACTIVITY

READ THESE TWO TOGETHER

Percent complete and cost to complete only mean something next to contingency utilization. A job that is 44% complete with contingency already spent is a different conversation than one at the same percentage with contingency untouched.

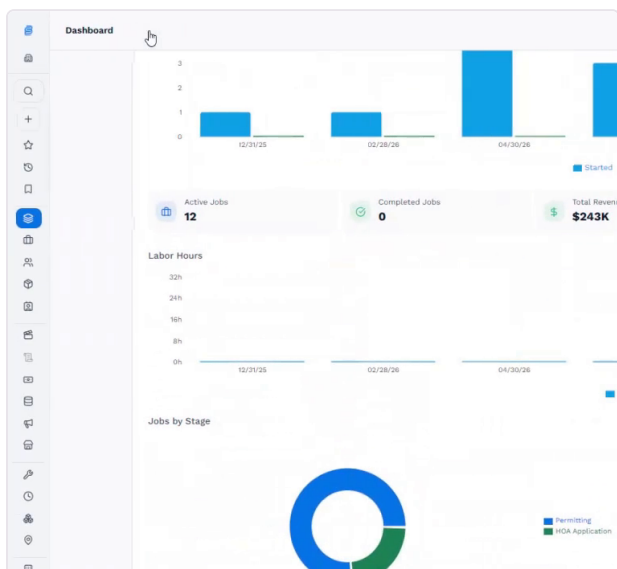
PART TWO

The side menu

Everything in the app hangs off the left-hand menu.

STEP 10 Collapse and expand the menu

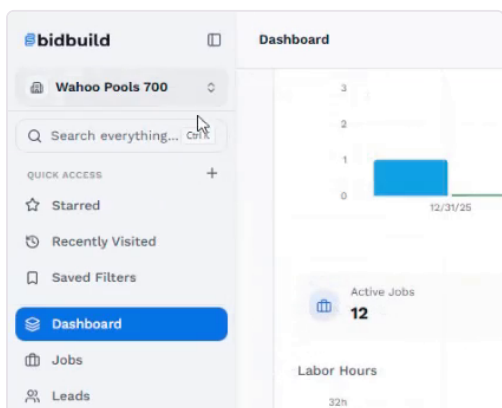
The icon at the top of the menu **collapses** it to icons when you want more room on screen. Select it again to expand it and see every option by name.



SIDE MENU · COLLAPSED

STEP 11 Switch companies, then search

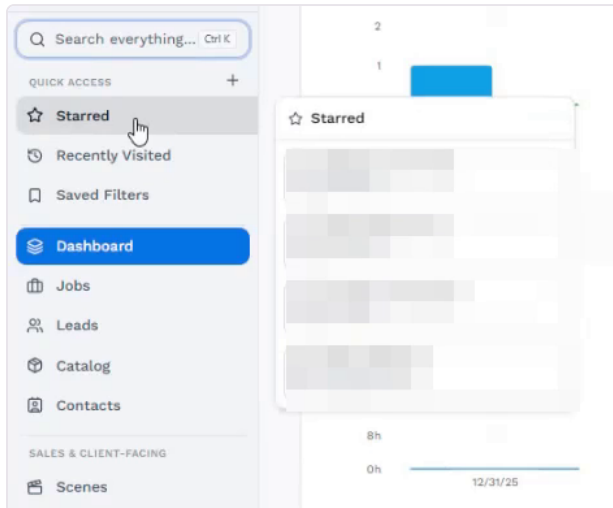
If you manage more than one company, the switcher at the top changes which one you are working in. Below it, **global search** takes any lead or job and jumps you straight to it.



SIDE MENU · COMPANY SWITCHER AND SEARCH

STEP 12 Quick Access — starred, recent, saved

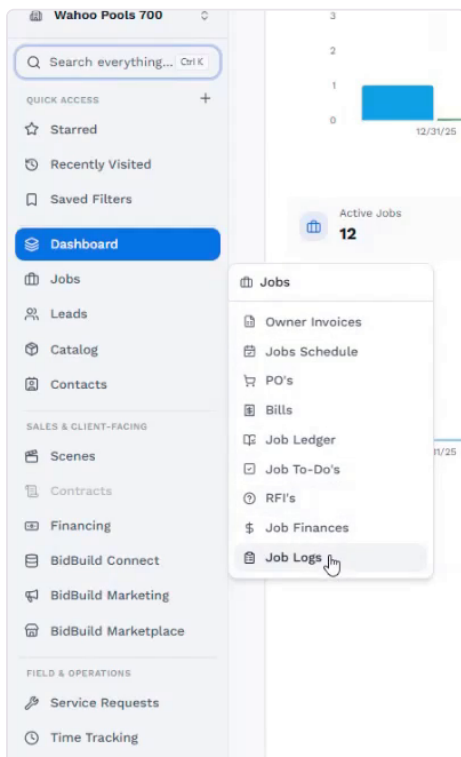
Starred holds the jobs you have flagged, **Recently Visited** retraces your steps, and **Saved Filters** keeps the views you use often.



QUICK ACCESS · STARRED

STEP 13 Jobs

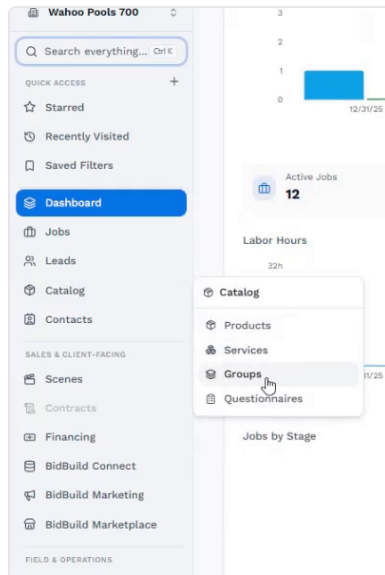
The **Jobs** menu opens owner invoices, job schedules, purchase orders, bills, the job ledger, job to-dos, job finances, RFIs, and job logs.



SIDE MENU · JOBS

STEP 14 Leads, Catalog, and Contacts

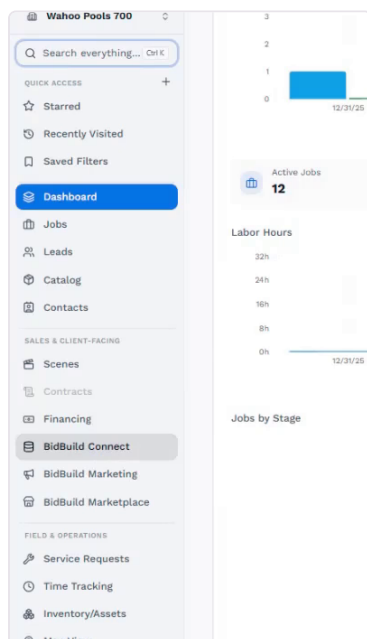
Leads covers your leads, backlog, and sales schedule. **Catalog** holds products, services, groups, and questionnaires. **Contacts** covers client contacts, users, and vendors.



SIDE MENU · CATALOG

STEP 15 Client-facing tools

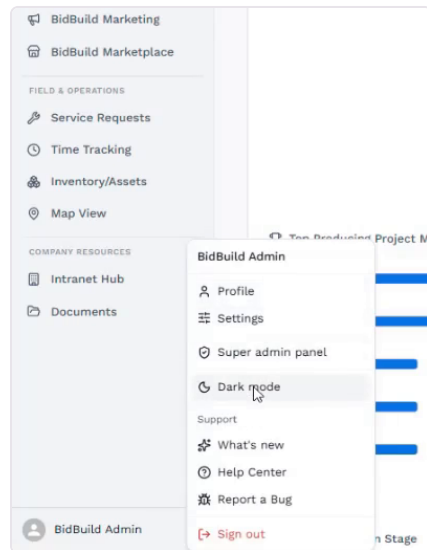
Scenes builds portfolios to present to clients. **Financing** lists every financing application and its status. **BidBuild Connect** opens the client portal, **BidBuild Marketing** your marketing tools, and **Marketplace** the BidBuild marketplace where it is enabled for your account.



SIDE MENU · SALES AND CLIENT-FACING

STEP 16 Field, operations, and your profile

Service Requests, **Time Tracking**, **Inventory/Assets**, **Map View**, the **Intranet Hub**, and **Documents** sit at the bottom of the menu. Your name opens profile and general settings, dark or light mode, what's new, the help center, report a bug, and sign out.



SIDE MENU · PROFILE

TIP

Star the jobs you touch daily. Quick Access is faster than search when you are moving between the same handful of projects all week.

REFERENCE

Where things live

The fastest route to the screens people ask for most.

LOOKING FOR

GO TO

Owner invoices

Jobs → Owner Invoices

Purchase orders / bills

Jobs → PO's, Jobs → Bills

Job ledger, job finances

Jobs → Job Ledger / Job Finances

To-dos and RFIs

Jobs → Job To-Do's / RFI's

Job logs

Jobs → Job Logs

Backlog and sales schedule

Leads → Backlog / Sales Schedule

Products and services

Catalog → Products / Services

Vendors and users

Contacts → Vendors / Users

Client portal

BidBuild Connect

Financing applications

Financing

IF THE NUMBERS LOOK WRONG

- Check the **date range** on that section — each one is set independently.
- Clear any **filters** left on the section, including division and agent.
- Confirm the chart is on the interval you expect — **day, month, or year**.
- Remember that **actual** sales only post when a proposal is accepted and converted to a job — pending proposals will not appear.

NEXT UP

Once the dashboard makes sense, the natural next step is creating work: see the companion guide **How to Add a New Lead** for the two ways to get an opportunity into BidBuild.