

Managing Budgets, Purchase Orders, and Bills in BidBuild

This document explains how to move from a budget line item to a purchase order, convert that purchase order into a bill, and then send the bill to QuickBooks or mark it as paid. It also covers a faster shortcut method and how to review all purchase orders and bills across jobs.

Step 1: Open the Relevant Job

Go to the job that you want to work on.

The screenshot shows the BidBuild dashboard for 'Heritage Demo Account'. The left sidebar contains a 'QUICK ACCESS' section with 'Starred', 'Recently Visited', and 'Saved Filters'. Below this is a 'Dashboard' button, followed by the 'Jobs' button which is highlighted with an orange circle. A dropdown menu is open from 'Jobs', showing options like 'Owner Invoices', 'Jobs Schedule', 'PO's', 'Bills', 'Job Ledger', 'Job To-Do's', 'RFI's', 'Job Finances', and 'Job Logs'. The main content area shows 'Updates' with 'Current Leads', 'Current Jobs', and 'Current Clients' sections. The 'Current Jobs' section lists 'Smith 5.13.26', 'Heritage Test Job 1', 'Greene 45-26-1001', and 'Smith Job'. The 'Current Clients' section lists 'Katie Smith', 'Lee Kastor', and 'Dave Greene'. The main content area also shows a 'Portal' section with a message: 'Conduit Schedule 40 Bell End | 44495" was added to "Plumbing" phase' with a price change of '\$1,593.60 (-7.91%)'.

When you are in the job, go to the **Finance** section.

The screenshot shows the BidBuild Jobs list view for 'Heritage Demo Account'. The left sidebar is the same as the previous screenshot. The 'Jobs' button is highlighted with an orange circle. The main content area shows a list of jobs with columns: Job Name, Client, Manager, Job Type, Date, Status, and St. The jobs listed are 'Heritage Test Job 1', 'Smith 5.13.26', and 'Smith 5.13.26'. The 'Smith 5.13.26' job is highlighted with an orange circle. The 'Status' column shows 'Active' for all jobs. The 'Manager' column shows 'Blake Ernest' for 'Heritage Test Job 1' and 'BidBuild Admin' for the 'Smith 5.13.26' jobs. The 'Job Type' column shows 'Concrete Pool Co...' for all jobs. The 'Date' column shows '05/18/26' for 'Heritage Test Job 1' and '05/13/26' and '05/08/26' for the 'Smith 5.13.26' jobs. The 'Status' column shows 'Active' for all jobs. The 'St' column shows 'PRI' for 'Heritage Test Job 1' and 'LA' for the 'Smith 5.13.26' jobs.

bidbuild Jobs > **Smith Job**

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Smith Job Active

Smith Pool Heater Quote

Created 02:49 p.m. 05/08/26

Analysis

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Invoices

Change Orders

Equipment 05/08/26

Show unscheduled phases (2)

Financial summary

Contract value	Budget cost	Profit	Complete
\$19,494.11	\$17,011.94	\$2,482.17	0%
No change orders	\$17,011.94 to complete	13% margin (profit + contract value)	-\$1,698
Billed to client		\$0.00 of \$19,494.11	Spent against budget

Step 2: Review Budgets for the Job

In the Finance section, open **Budgets**. This is a list of all of the budgets from the proposal that get transferred into the budget area.

bidbuild Jobs > **Smith Job**

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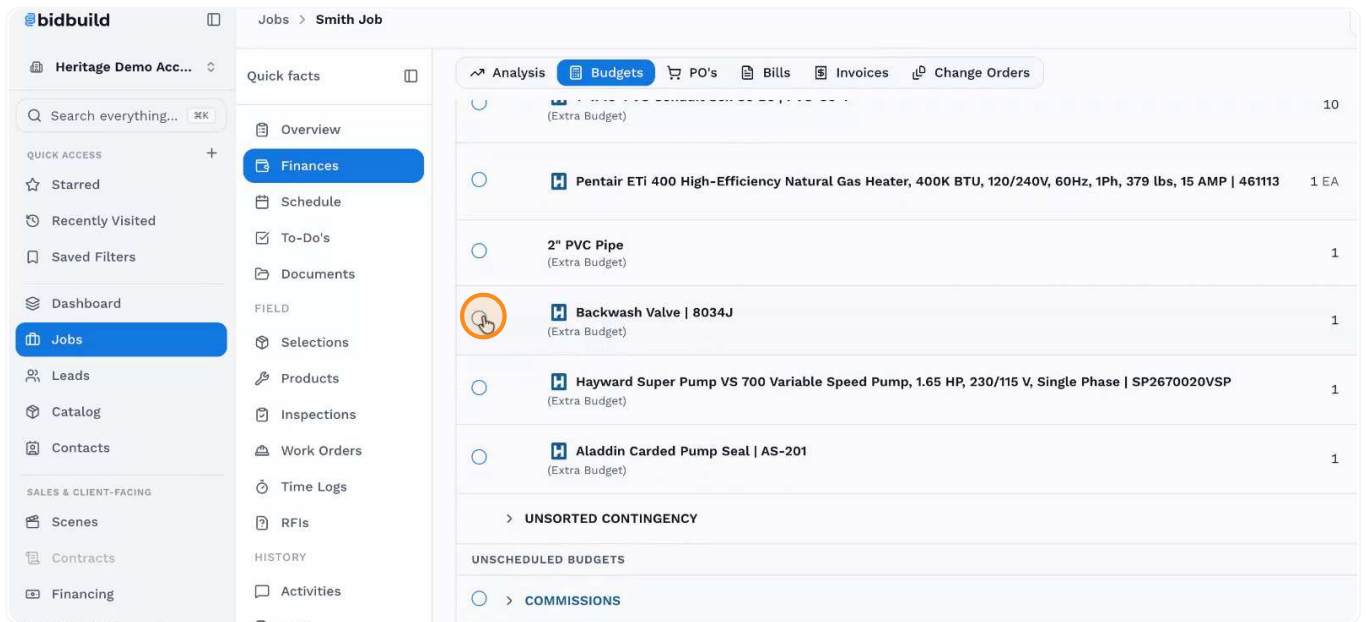
Invoices

Change Orders

Budgets

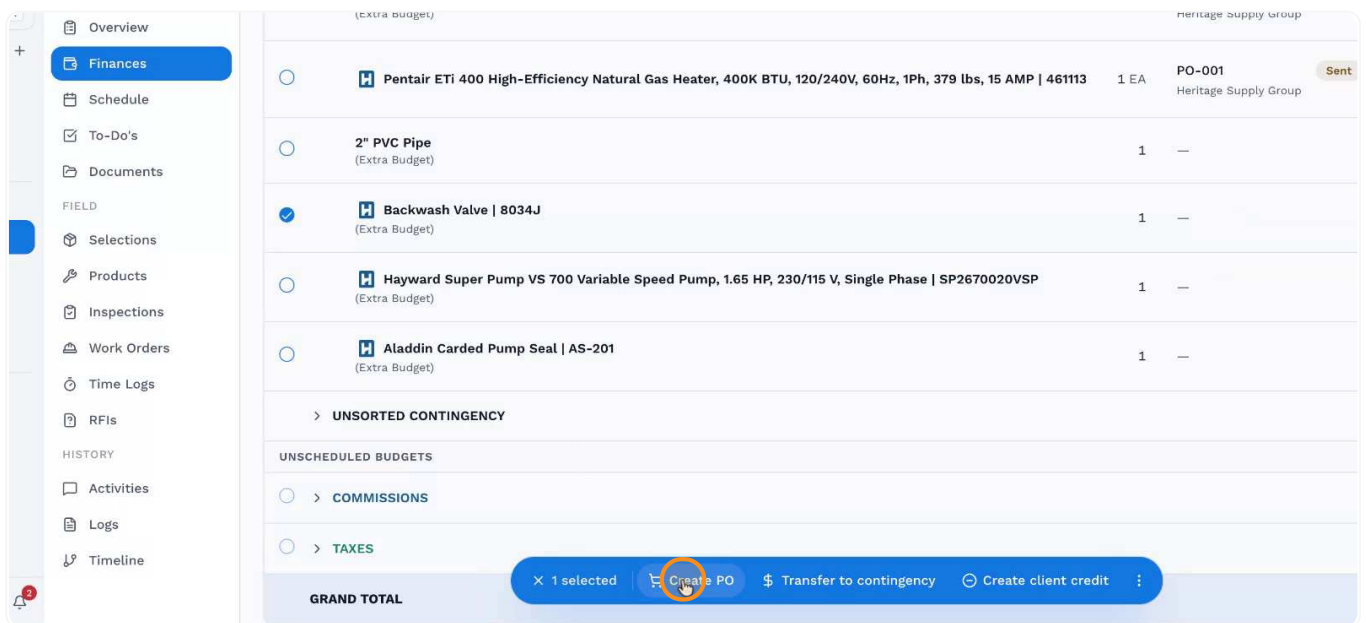
Budget Name	Qty	Purchase Orders	Starting Contingency	Starting Budget	Used Contingency	Actual I
EQUIPMENT			\$597.00	\$11,945.09	-\$2,295.61	\$14,
UNSORTED CONTINGENCY			-\$0.00		\$0.00	
UNSCHEDULED BUDGETS						
COMMISSIONS			\$0.00	\$1,433.41	\$0.00	\$1,
TAXES			\$0.00	\$1,337.83	\$0.00	\$1,
GRAND TOTAL			\$597.00	\$14,716.33	-\$2,295.61	\$17,

From here, select the budget items that you want to create a purchase order for.



Step 3: Create and Save the Purchase Order

Select where the purchase order is going to go to (the vendor or recipient).



Save the purchase order.

Create Purchase Order

Create a new purchase order for Smith Job

PO DETAILS

Title: Smith Job

Vendor: Heritage Supply Group

☒ Hide costs/totals for vendor
☒ Add auto-numeration (e.g. [Your title] PO-001)

LINE ITEMS

Item	QTY	Unit	Budget Cost	Current Cost
Backwash Valve 8034J 8034J	1 1 of 1 available	—	\$369.06	\$300.04

+ Add budget item

+ Create budget

\$ COST SUMMARY

Address

6657 US 301

City: Chicago

State: IL

Zip: 33578

CONTACT PERSON

Name: BidBuild Admin

Email: dave@bidbuild.app

Phone:

NOTES & ATTACHMENTS

Notes:

File Attachments

Upload files

Cancel

Save

Create Bill

Once it is saved, you will see that the purchase order has been created. You can then go into your **PO** section.

bidbuild

Jobs > Smith Job

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MATERIAL (6)

Backwash Valve 8034J (Extra Budget)	1
1" x 10' PVC Conduit Sch 80 Be PVC-80-1 (Extra Budget)	10
Pentair ETi 400 High-Efficiency Natural Gas Heater, 400K BTU, 120/240V, 60Hz, 1Ph, 379 lbs, 15 AMP 461113	1 EA
2" PVC Pipe (Extra Budget)	1
Hayward Super Pump VS 700 Variable Speed Pump, 1.65 HP, 230/115 V, Single Phase SP2670020VSP (Extra Budget)	1
Aladdin Carded Pump Seal AS-201 (Extra Budget)	1

Locate that same purchase order, go to the approval area, and approve it.

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Purchase Orders

PO #	Vendor	Status	Heritage Status	Cost	Created	Actions
Smith Job PO-001	Heritage Supply Group	Sent	New	\$11,945.09	11:28 a.m. 05/09/26	 
Smith Job PO-002	Heritage Supply Group	Sent	Acknowledged	\$212.80	09:30 a.m. 07/06/26	 
Smith Job PO-004	ARTISTIC PAVERS	Sent	N/A	\$300.04	09:07 p.m. 10/12/26	 
Total				\$12,457.93		

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PO #	Vendor	Status	Heritage Status	Cost	Created	Actions
Smith Job PO-001	Heritage Supply Group	Sent	New	\$11,945.09	11:28 a.m. 05/09/26	 
Smith Job PO-002	Heritage Supply Group	Sent	Acknowledged	\$212.80	09:30 a.m. 07/06/26	 
Smith Job PO-004	ARTISTIC PAVERS	Sent	N/A	\$300.04	09:07 p.m. 10/12/26	 
Total				\$12,457.93		

Rows per page: 50 1-3 of 3

Are you sure you want to approve purchase order "Smith Job PO-004"?

Cancel Confirm

Step 4: Create a Bill from the Approved Purchase Order

Once the purchase order has been approved, it is ready to receive a bill. Select **Create Bill** from the purchase order.

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PO #	Vendor	Status	Heritage Status	Cost	Created	Actions
Smith Job PO-001	Heritage Supply Group	Sent	New	\$11,945.09	11:28 a.m. 05/09/26	
Smith Job PO-002	Heritage Supply Group	Sent	Acknowledged	\$212.80	09:30 a.m. 07/06/26	
Smith Job PO-004	ARTISTIC PAVERS	Approved	N/A	\$300.04	09:07 p.m. 10/12/26	
Total				\$12,457.93		

Rows per page: 50

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Enter all the information from the vendor's bill and create the bill.

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Enable auto-numeration (e.g. B-001)

Job *

Smith Job

Vendor *

ARTISTIC PAVERS

Description

SCHEDULE & PAYMENT

Payment term

Select...

Due date

Pick a date

DOCUMENTS

PDF document

Upload PDF

Only .pdf files accepted

Attachments

Upload files

Cancel

Create Bill

Cost

Created

Actions

\$11,945.09	11:28 a.m. 05/09/26	
\$212.80	09:30 a.m. 07/06/26	
\$300.04	09:07 p.m. 10/12/26	
\$12,457.93		

Rows per page: 50

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Once the bill has been created, you will find it inside the **Bills** section.

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Jobs > Smith Job

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Purchase Orders

PO #	Vendor	Status	Heritage Status	Cost	Created
Smith Job PO-001	Heritage Supply Group	Sent	New	\$11,945.09	11:28 a.m. 05/09/26
Smith Job PO-002	Heritage Supply Group	Sent	Acknowledged	\$212.80	09:30 a.m. 07/06/26
Smith Job PO-004	ARTISTIC PAVERS	Billed	N/A	\$300.04	09:07 p.m. 10/12/26
Total				\$12,457.93	

Rows per page: 50

Jobs > Smith Job

Search bills...

Analysis Budgets PO's Bills Invoices Change Orders

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Time Logs

RFIs

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Activities

Bills

Title	Vendor	Status	Date	Amount	Remaining	Actions
Smith Job PO-004	ARTISTIC PAVERS	Pending	10/12/26	\$300.04	\$300.04	
Total				\$300.04	\$300.04	 Edit  Apply Payment  Mark as paid  Delete

Rows per page: 50 1 of 1

From there, if you have a QuickBooks integration, you can send this bill directly to QuickBooks from the options on the side, or simply mark it as paid.

Jobs > Smith Job

Search bills...

Analysis Budgets PO's Bills Invoices Change Orders

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Title	Vendor	Status	Date	Amount	Remaining	Actions
Smith Job PO-004	ARTISTIC PAVERS	Pending	10/12/26	\$300.04	\$300.04	:
Total				\$300.04	\$300.04	 Edit  Apply Payment  Mark as paid  Delete

Rows per page: 50 1 of 1

Step 5: Use the Quicker Budget-to-Bill Shortcut

The other, quicker option is to start again from your **Budget**:

bidbuild

Heritage Demo Acc...

Search everything...

QUICK ACCESS

Starred

Recently Visited

Saved Filters

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Jobs > Smith Job

AnalysisBudgetsPO'sBillsInvoicesChange Orders

Bills

Title	Vendor	Status	Date	Amount
Smith Job PO-004	ARTISTIC PAVERS	Paid	10/12/26	\$300.04
Total				\$300.04

Select your budget items.

bidbuild

Heritage Demo Acc...

Search everything...

QUICK ACCESS

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Jobs > Smith Job

AnalysisBudgetsPO'sBillsInvoicesChange Orders

Budgets

Budget Name	Qty	Purchase Orders	Starting Contingency	Starting Budget	Used Contingency	Actual
EQUIPMENT			\$597.00	\$11,945.09	-\$2,226.59	\$14,315.50
UNSORTED CONTINGENCY			-\$0.00		\$0.00	
UNSCHEDULED BUDGETS						
COMMISSIONS			\$0.00	\$1,433.41	\$0.00	\$1,433.41
TAXES			\$0.00	\$1,337.83	\$0.00	\$1,337.83
GRAND TOTAL			\$597.00	\$14,716.33	-\$2,226.59	\$16,086.74

Choose **Create Purchase Order**.

Search everything...

QUICK ACCESS

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BidBuild Marketplace

BidBuild Admin

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Backwash Valve | 8034J
(Extra Budget)

1" x 10' PVC Conduit Sch 80 Be | PVC-80-1
(Extra Budget)

Pentair ET1 400 High-Efficiency Natural Gas Heater, 400K BTU, 120/240V, 60Hz, 1Ph, 379 lbs, 15 AMP | 461113

2" PVC Pipe
(Extra Budget)

Hayward Super Pump VS 700 Variable Speed Pump, 1.65 HP, 230/115 V, Single Phase | SP2670020VSP
(Extra Budget)

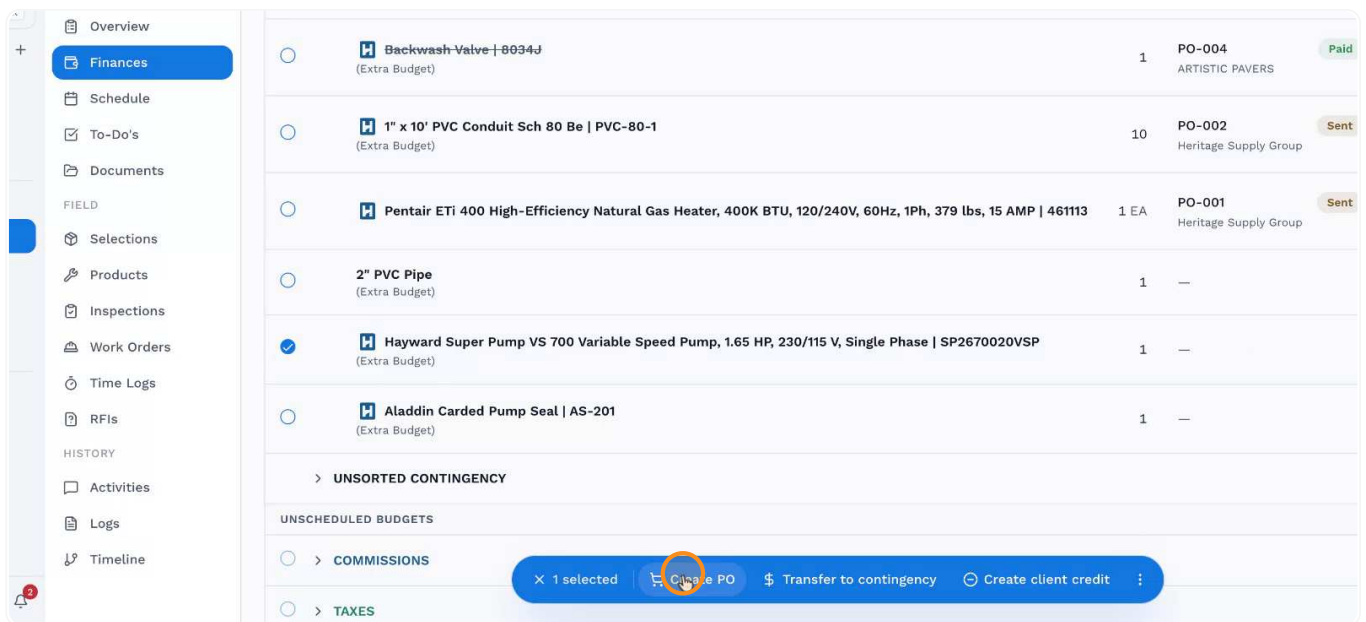
Aladdin Carded Pump Seal | AS-201
(Extra Budget)

UNSORTED CONTINGENCY

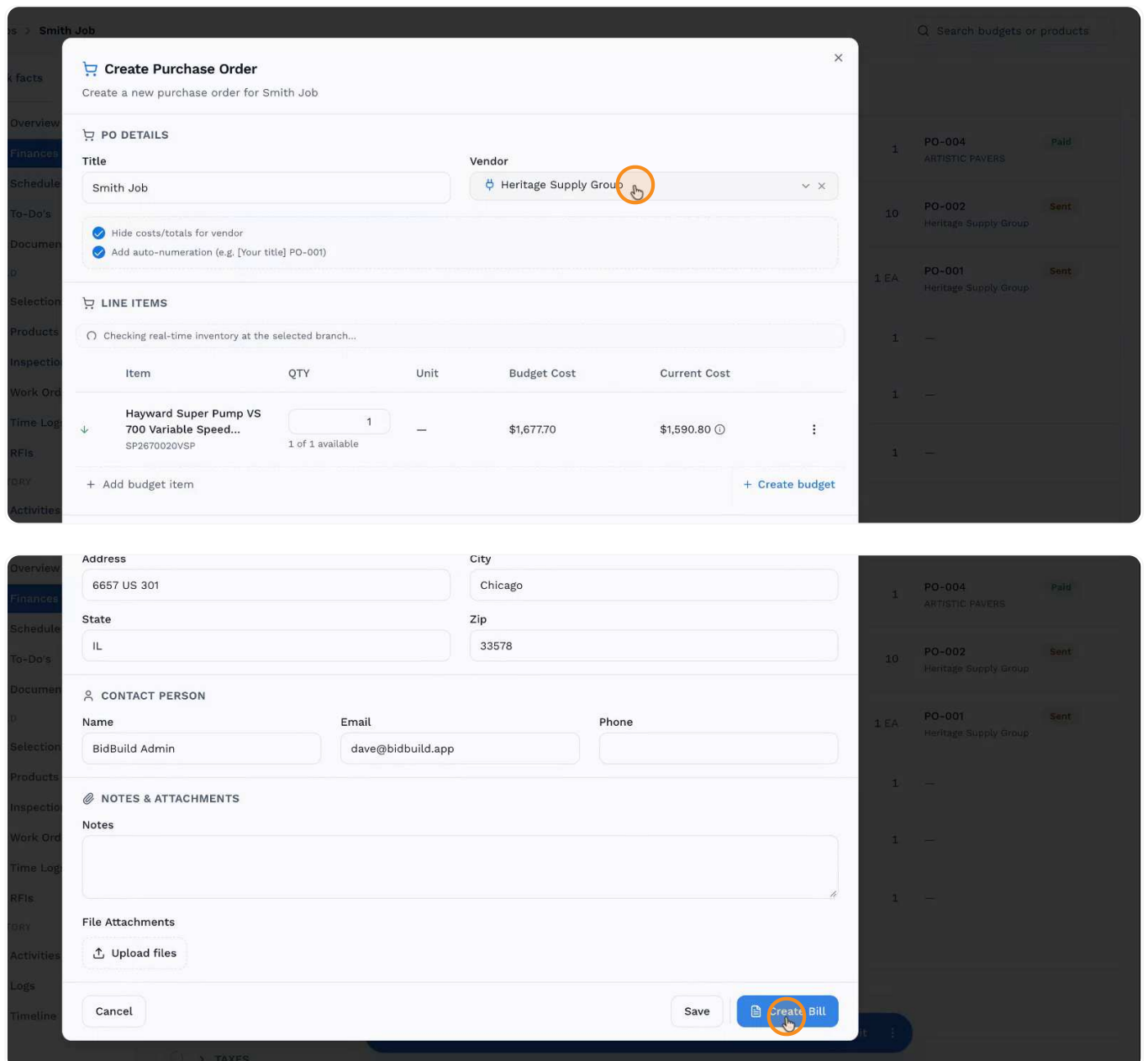
UNSCHEDULED BUDGETS

COMMISSIONS

TAXES



Select where you want to send those items (the vendor) and then directly choose **Create Bill** without going through a separate PO approval step.



From there, once the bill has been created, you can proceed to manage it.

Jobs > Smith Job

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Create Bill

Create a new bill with vendor details and attachments.

BILL DETAILS

Title

Smith Job PO-005

Bill amount

1590.8

Bill Number

Bill date *

10/12/2026

Job *

Smith Job

Vendor *

CMP

Description

SCHEDULE & PAYMENT

Jobs > Smith Job

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Hayward Super Pump VS 700 Variable Speed Pump, 1.65 HP, 230/115 V, Single Phase | SP2670020VSP

(Extra Budget)

1

PO-005

CMP

Backwash Valve | 8034J

(Extra Budget)

1

PO-004

ARTISTIC PAVI

1" x 10' PVC Conduit Sch 80 Be | PVC-80-1

(Extra Budget)

10

PO-002

Heritage Supp

Pentair ETi 400 High-Efficiency Natural Gas Heater, 400K BTU, 120/240V, 60Hz, 1Ph, 379 lbs, 15 AMP | 461113

(Extra Budget)

1 EA

PO-001

Heritage Supp

2" PVC Pipe

(Extra Budget)

1

—

Aladdin Carded Pump Seal | AS-201

(Extra Budget)

1

—

UNSORTED CONTINGENCY

Go to the bill that has been created and again either send it to QuickBooks or mark it as paid.

Jobs > Smith Job

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Title	Vendor	Status	Date	Amount	Remaining	Actions
Smith Job PO-004	ARTISTIC PAVERS	Paid	10/12/26	\$300.04	\$0.00	
Smith Job PO-005	CMP	Pending	10/12/26	\$1,590.80	\$1,590.80	
Total				\$1,890.84	\$1,590.80	

Rows per page: 50

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Step 6: Review All Purchase Orders and Bills Across Jobs

Also note that it is a good habit to use the **Job** section overview. Here, you also have access to all **Bills** and **POs** in one area.

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Title	Vendor	Status	Date	Amount	Remaining	Actions
Smith Job PO-004	ARTISTIC PAVERS	Paid	10/12/26	\$300.04	\$0.00	⋮
Smith Job PO-005	CMP	Pending	10/12/26	\$1,590.80	\$1,590.80	⋮
Total				\$1,890.84	\$1,590.80	✎ Edit 💰 Apply Payment ✅ Mark as paid 🗑 Delete

Rows per page: 50 1-2 of 2

When you select this page, you will see all of the purchase orders that are associated with all jobs.

Search everything...

QUICK ACCESS

☆ Starred

🕒 Recently Visited

🔖 Saved Filters

📊 Dashboard

🏠 Jobs

👤 Leads

📦 Catalog

📇 Contacts

SALES & CLIENT-FACING

🏡 Scenes

📄 Contracts

💰 Financing

🔗 BidBuild Connect

🏪 BidBuild Marketplace

BidBuild Admin

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Job To-Do's

RFI's

Job Finances

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Title	Vendor	Status	Date	Amount
Smith Job PO-004	ARTISTIC PAVERS	Paid	10/12/26	\$300.04
Smith Job PO-005	CMP	Pending	10/12/26	\$1,590.80
Total				\$1,890.84

Rows per page: 50 1-2 of 2

You will also see the same consolidated view for all bills.

bidbuild

Heritage Demo Acc...

Search everything...

QUICK ACCESS

- Starred
- Recently Visited
- Saved Filters

Dashboard

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SALES & CLIENT-FACING

- Scenes
- Contracts
- Financing

PO's

POs [Jump to Bills Page](#)

Date range

APPROVED2

SENT7

DECLINED0

BILLED1

PAID1

PO Name	Items	Status	Heritage Status	Current Cost	Contingency	Job Name	Date	Vendor
Heritage Test Job 1 PO-001	2	Sent	Closed	\$12,037.29	\$0.00	Heritage Test Job 1	05/18/26	Heritage Test Job 1
Heritage Test Job 1 PO-006	1	Approved	New	\$11.05	\$0.00	Heritage Test Job 1	07/02/26	Heritage Test Job 1
Smith Job PO-001	1	Sent	New	\$11,945.09	\$0.00	Smith Job	05/09/26	Smith Job
Heritage Test Job 1 PO-005	1	Sent	Acknowledged	\$182.85	\$0.00	Heritage Test Job 1	05/28/26	Heritage Test Job 1
Smith Job PO-005	1	Billed	N/A	\$1,590.80	+\$86.90	Smith Job	10/12/26	CMP

It is very common to set your filtering to see only **All Pending**. These are all bills that either need to be sent to QuickBooks or still need to be paid.

bidbuild

Heritage Demo Acc...

Search everything...

QUICK ACCESS

- Starred
- Recently Visited
- Saved Filters

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Jobs

Leads

Catalog

Contacts

SALES & CLIENT-FACING

- Scenes
- Contracts
- Financing

Bills

[Jump to PO's Page](#)

Date range

PENDING1

RELEASED0

PAID1

PARTLY PAID0

Payment Title	Status	Bill Date	Due Date	Job	Purchase Order	QuickBooks Status	Vendor	Bill Amount
Smith Job PO-004	Paid	10/12/26	N/A	Smith Job	Smith Job PO-004	Disconnected	ARTISTIC PAVERS	\$300.04
Smith Job PO-005	Pending	10/12/26	N/A	Smith Job	Smith Job PO-005	Disconnected	CMP	\$1,590.80
Total								\$1,890.84