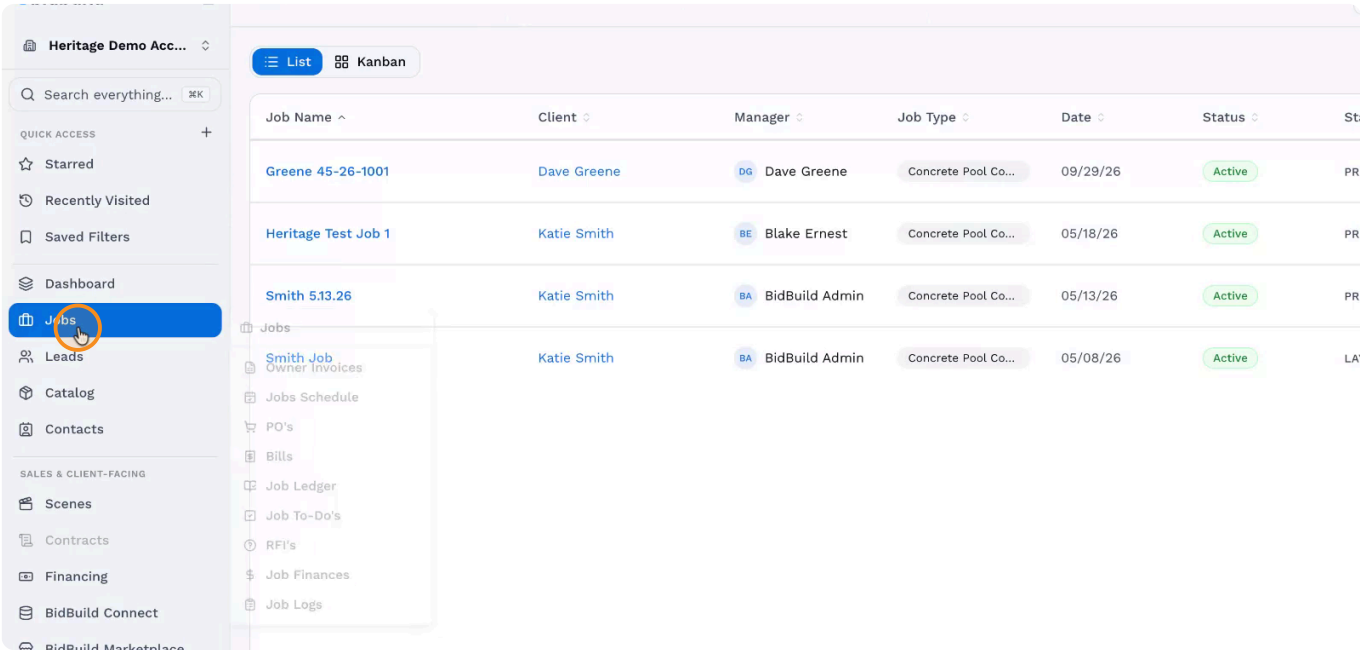


Creating a Client Credit Against Purchased Products

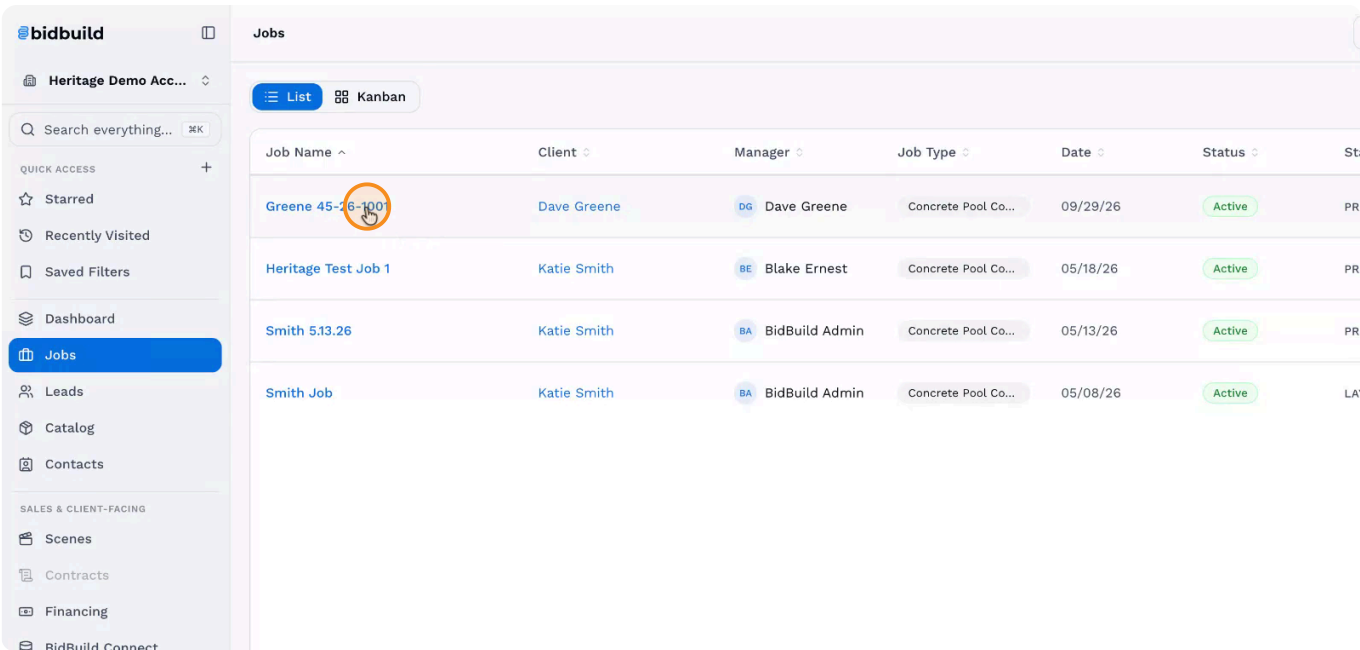
This process explains how to create and send a client credit for specific products on a job, how the client reviews and approves the credit, and how the approved credit appears in your finance and budget sections.

Step 1: Open the Relevant Job

Navigate to the **Jobs** section and locate the job you want to apply the credit to.



Select the specific job from the list.



Step 2: Access the Finance Tab and Budgets

Within the selected job, go to the **Finance** tab, then open the **Budgets** area.

Greene 45-26-1001 Active

Greene New Pool
Created 09:37 a.m. 09/29/26

Financial summary

Contract value \$47,295.33 No change orders	Budget cost \$37,250.08 \$37,250.08 to complete	Profit \$10,045.25 21% margin (profit ÷ contract value)	Completeness 0% \$1,730.5
Billed to client 0% collected		\$0.00 of \$47,295.33 \$47,295.33 outstanding	
		Spent against budget \$0.00 committed in POs	

Step 3: Locate the Product to Credit

Use the search function to find the product you want to credit back to the client.

Budgets

Budget Name	Qty	Purchase Orders	Starting Contingency	Starting Budget	Used Contingency
> ENGINEERING & PERMITTING			\$200.00	\$3,800.00	\$0.00
> EQUIPMENT			\$10.00	\$0.00	\$0.00
> PATIO			\$20.00	\$450.00	\$0.00
> PLUMBING			\$0.50	\$9.00	\$0.00
> PRE-CONSTRUCTION			\$1,500.00	\$29,000.00	\$0.00
> UNSORTED CONTINGENCY			-\$0.00		\$0.00
CLIENT CREDITS (1 - \$137.00 applied)					
Credit #001 Approved 09/29/26					
UNSCHEDULED BUDGETS					

Select the product from the search results.

Navigation

- Search everything... 🔍
- Overview
- Finances**
- Schedule
- To-Do's
- Documents
- FIELD
- Selections
- Products
- Inspections
- Work Orders
- Time Logs
- RFI's
- HISTORY
- Activities
- Logs
- Timeline
- FIELD & OPERATIONS

QUICK ACCESS

- Starred
- Recently Visited
- Saved Filters
- Dashboard
- Jobs**
- Leads
- Catalog
- Contacts
- SALES & CLIENT-FACING
- Scenes
- Contracts
- Financing
- BidBuild Connect
- BidBuild Marketplace

Budget Name	Qty	Purchase Orders	Starting Contingency	Starting Budget	Us
> ENGINEERING & PERMITTING			\$200.00	\$3,800.00	
> EQUIPMENT			\$10.00	\$0.00	
▼ PATIO			\$20.00	\$450.00	
▼ 🛠️ LABOR (1)			\$20.00	\$450.00	
🔗 Freight Charge – Travertine	1 EA	+ Order	\$20.00	\$450.00	
> PLUMBING			\$0.50	\$9.00	
> PRE-CONSTRUCTION			\$1,500.00	\$29,000.00	
> UNSORTED CONTINGENCY			-\$0.00		
CLIENT CREDITS (1 - \$137.00 applied)					
🚫 Credit #001 Approved 09/29/26					
UNSCCHEDULED BUDGETS					

Step 4: Create the Client Credit

With the product selected, choose **Create Client Credit**.

Step 5: Configure Credit Amount and Markups, Then Send

When finished configuring the credit, select **Save and Send** to issue it to the client.

Credit customer back

The budget scope the customer no longer wants. Tax, commissions and profit are credited alongside it and can be edited per line.

☒ Include taxes & commissions

Budget / item	Unit cost	Avail	Credit qty	Credit \$	CMU	AMU	MMU	PMU	Credit
Patio ☒ Freight Charge – Travertine	\$450.00	1	1	450		31.5	22.5	112.5	\$616.50

Reason / notes

e.g. Owner-supplied tile, scope reduction...

1 item selected

Subtotal

\$450.00

CMU

\$0.00

AMU

\$31.50

MMU

\$22.50

PMU

\$112.50

Total credit

-\$616.50

Cancel

Save draft

Save & send

UNSCHEDULED BUDGETS

X 1 selected

Create PO

Transfer to contingency

Create client credit

COMMISSIONS

\$0.00

\$3,991.08

Heritage Demo Acc...

Search everything...

Starred

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Financing

BidBuild Connect

BidBuild Marketplace

BidBuild Admin

Jobs

Greene 45-26-1001

Analysis

Budgets

PO's

Bills

Invoices

Change Orders

Quick facts

Analysis

Budgets

PO's

Bills

Invoices

Change Orders

Credit customer back

The budget scope the customer no longer wants. Tax, commissions and profit are credited alongside it and can be edited per line.

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Budget / item	Unit cost	Avail	Credit qty	Credit \$	CMU	AMU	MMU	PMU	Credit
Patio ☒ Freight Charge – Travertine	\$450.00	1	1	450		31.5	22.5	112.5	\$616.50

Reason / notes

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Subtotal

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CMU

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AMU

\$31.50

MMU

\$22.50

PMU

\$112.50

Total credit

-\$616.50

Cancel

Save draft

Save & send

UNSCHEDULED BUDGETS

X 1 selected

Create PO

Transfer to contingency

Create client credit

COMMISSIONS

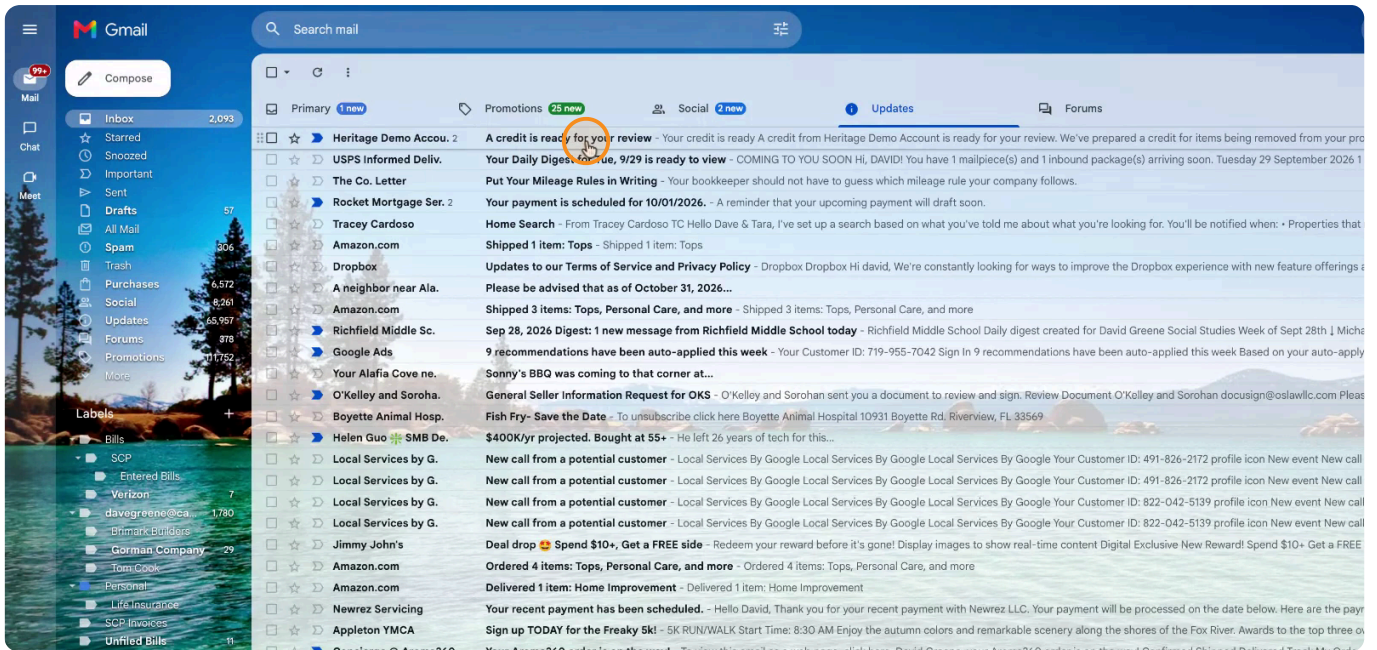
\$0.00

\$3,991.08

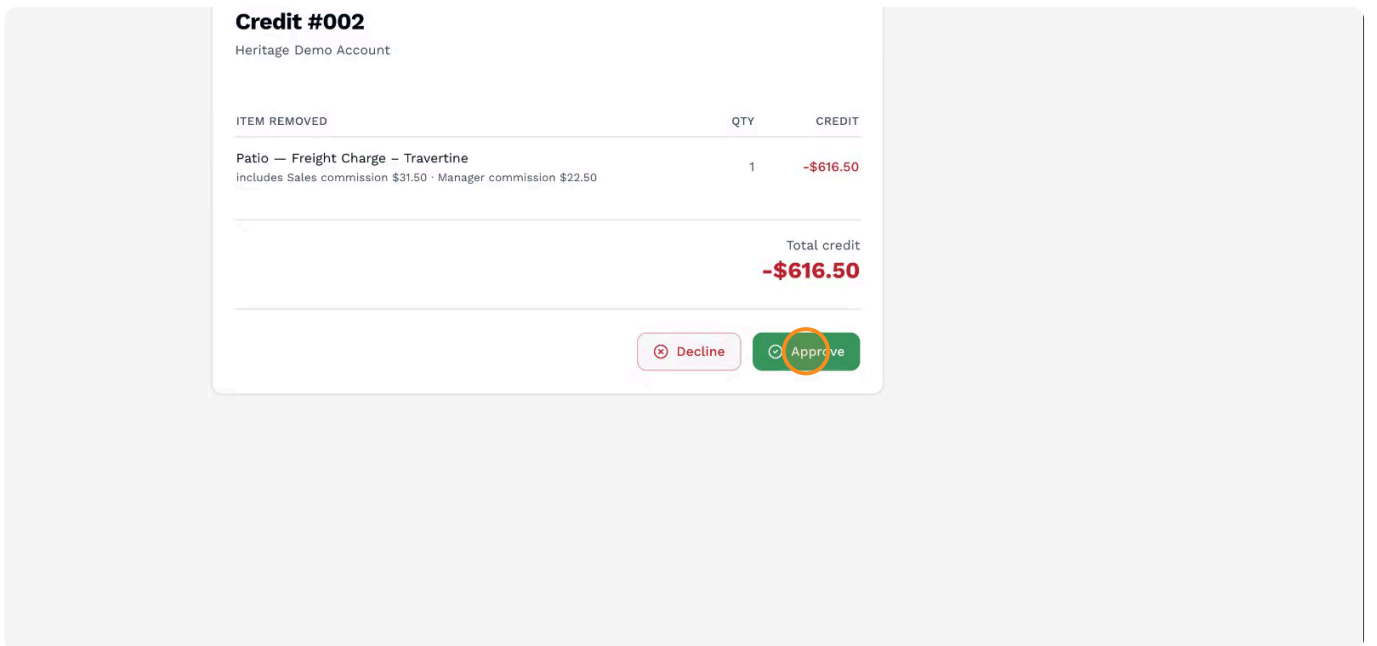
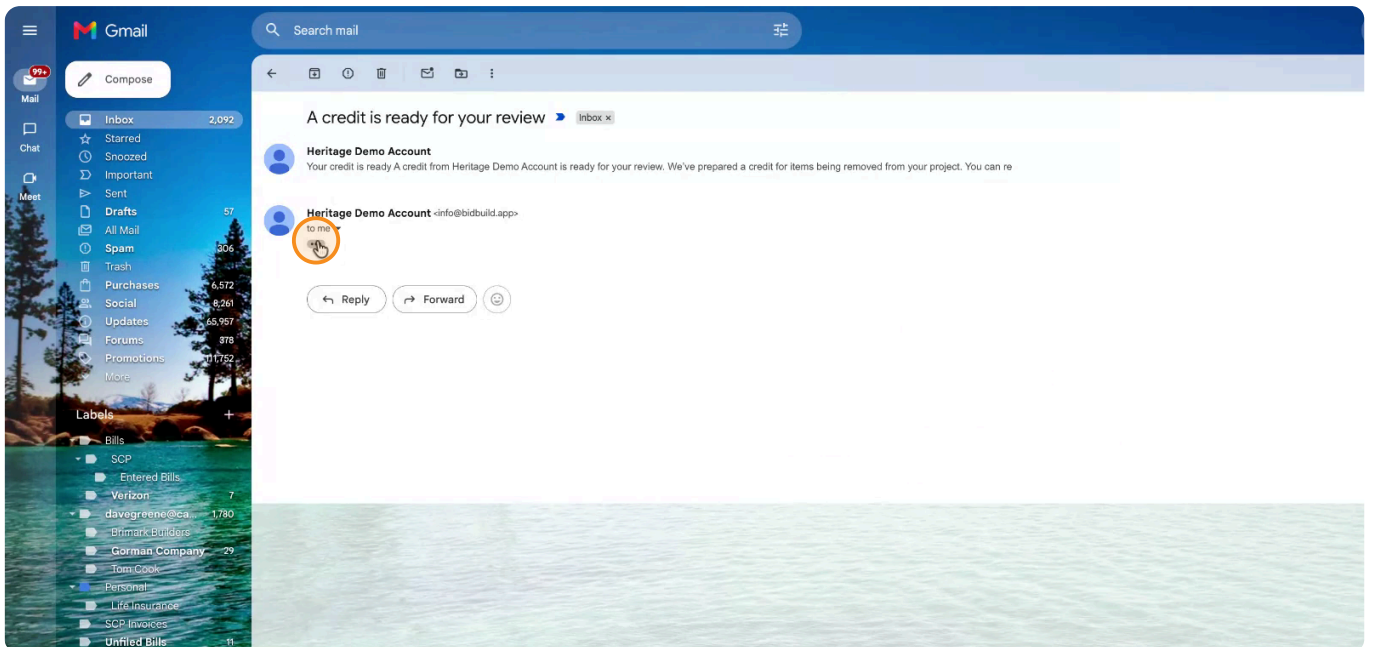
Credit is successfully created

Step 6: Client Reviews and Approves the Credit

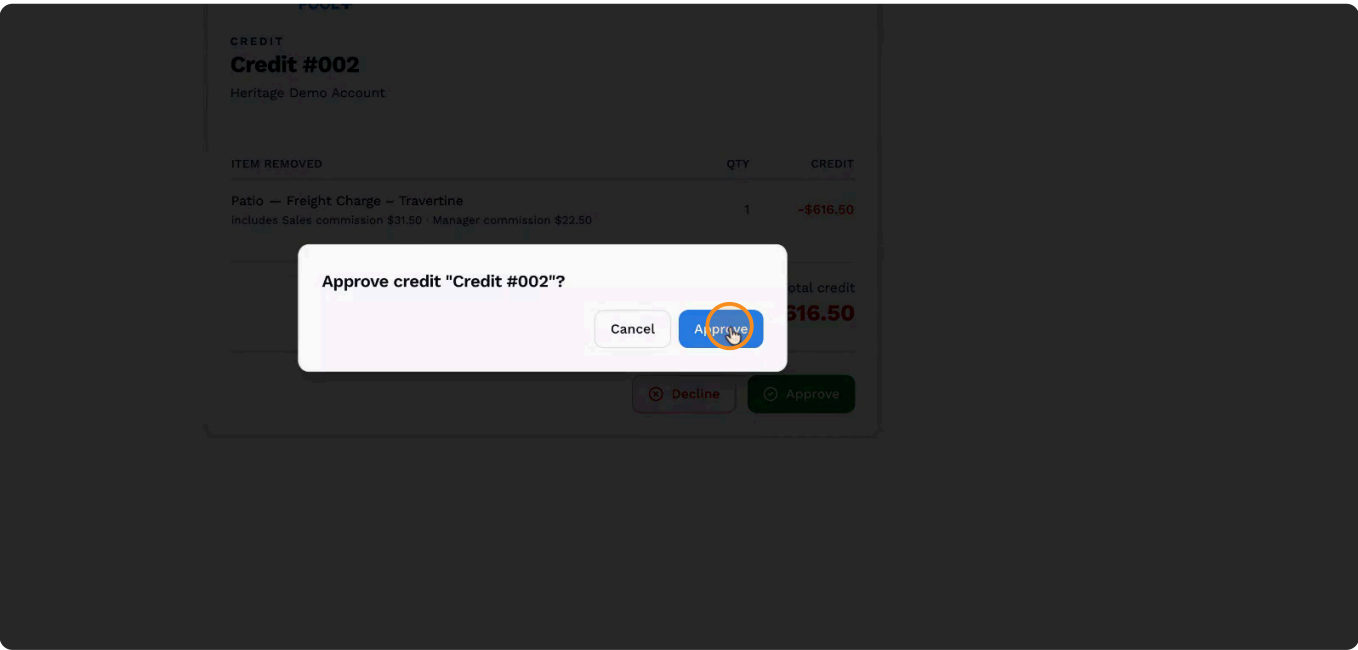
The client receives an email notification indicating that a credit is ready for review.



The client opens the credit, reviews the details, and approves the credit.

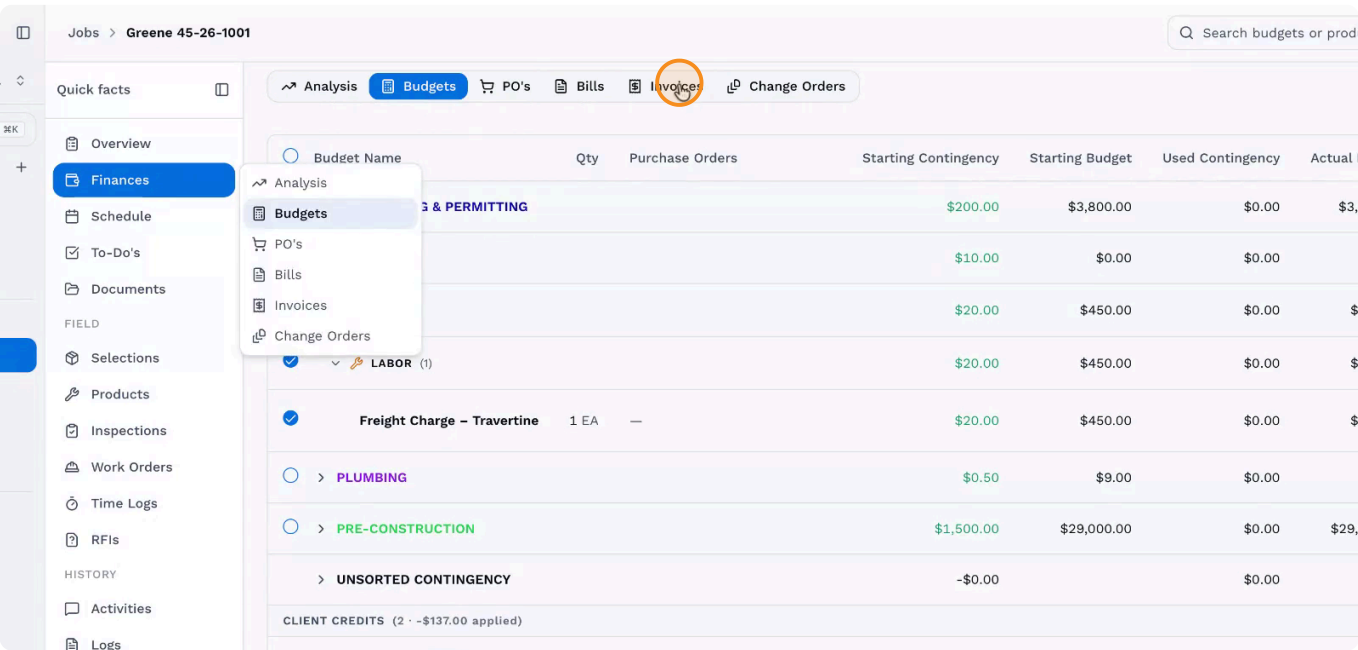


Once the credit has been approved, the status will update accordingly.



Step 7: Verify the Credit in Invoices

After approval, navigate to the **Finances > Invoice** section.



Confirm that the credit has been applied in the invoice area. From here, you can either mark the credit as paid or send it to QuickBooks, if you have a QuickBooks integration enabled.

Overview	Invoice #	Status	Date	Phase	Amount	Remaining	Actions
Finances	Credit #001	Pending	09/29/26	—	-\$137.00	-\$137.00	⋮
Schedule	Shell Installation OI-002	Pending	N/A	—	\$11,858.08	\$11,858.08	⋮
To-Do's	Pre-Construction Meeting OI-001	Pending	N/A	—	\$11,858.08	\$11,858.08	⋮
Documents	Pre=Plaster Meeting OI-005	Pending	N/A	—	\$2,371.62	\$2,371.62	⋮
.D	Decking Installed OI-004	Pending	N/A	—	\$4,743.23	\$4,743.23	⋮
Selections	Deposit OI-006	Pending	N/A	—	\$4,743.23	\$4,743.23	⋮
Products	Credit #002	Pending	09/29/26	—	-\$616.50	-\$616.50	⋮
Inspections	Tile Installed OI-003	Pending	N/A	—	\$11,858.08	\$11,858.08	⋮
Work Orders	Total				\$46,678.82	\$46,678.82	
Time Logs							
RFIs							
ORY							
Activities							
Logs							
Timeline							

Rows per page: 50 1-8 of 8

Step 8: Confirm the Credit Memo in the Budget

Return to the **Budget** section for the job.

bidbuild	Jobs > Greene 45-26-1001	Analysis	Budgets	PO's	Bills	Invoices	Change Orders
Heritage Demo Acc...	Quick facts	Invoice #	Status	Date	Phase	Amount	
Search everything...	Overview	Credit #001	Pending	09/29/26	—	-\$137.00	
QUICK ACCESS	Finances	Shell Installation OI-002	Pending	N/A	—	\$11,858.08	
Starred	Schedule	Pre-Construction Meeting OI-001	Pending	N/A	—	\$11,858.08	
Recently Visited	To-Do's	Pre=Plaster Meeting OI-005	Pending	N/A	—	\$2,371.62	
Saved Filters	Documents	Decking Installed OI-004	Pending	N/A	—	\$4,743.23	
Dashboard	FIELD	Deposit OI-006	Pending	N/A	—	\$4,743.23	
Jobs	Selections	Credit #002	Pending	09/29/26	—	-\$616.50	
Leads	Products	Tile Installed OI-003	Pending	N/A	—	\$11,858.08	
Catalog	Inspections						
Contacts	Work Orders						
SALES & CLIENT-FACING	Time Logs						
Scenes	RFIs						
Contracts	HISTORY						
Financing	Activities						
BidBuild Connect	Logs						

Heritage Demo Acc... ▾

QUICK ACCESS +

- Starred
- Recently Visited
- Saved Filters
- Dashboard
- Jobs
- Leads
- Catalog
- Contacts

SALES & CLIENT-FACING

- Scenes
- Contracts
- Financing
- BidBuild Connect

Jobs > Greene 45-26-1001

Quick facts ▮

Overview

Finances

Schedule

To-Do's

Documents

FIELD

- Selections
- Products
- Inspections
- Work Orders
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- RFIs

HISTORY

- Activities
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Analysis
 Budgets
 PO's
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Invoice #	Status	Date	Phase	Amount
Credit #001	Pending	09/29/26	—	-\$137.00
Shell Installation OI-002	Pending	N/A	—	\$11,858.08
Pre-Construction Meeting OI-001	Pending	N/A	—	\$11,858.08
Pre=Plaster Meeting OI-005	Pending	N/A	—	\$2,371.62
Decking Installed OI-004	Pending	N/A	—	\$4,743.23
Deposit OI-006	Pending	N/A	—	\$4,743.23
Credit #002	Pending	09/29/26	—	-\$616.50
Tile Installed OI-003	Pending	N/A	—	\$11,858.08

Verify that a credit memo is listed for the total credited amount that was applied.

bidbuild
Jobs > Greene 45-26-1001

Heritage Demo Acc...

Search everything... 🔍

QUICK ACCESS +

- Starred
- Recently Visited
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- Leads
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- Contacts

SALES & CLIENT-FACING

- Scenes
- Contracts
- Financing

Quick facts

- Overview
- Finances**
- Schedule
- To-Do's
- Documents

FIELD

- Selections
- Products
- Inspections
- Work Orders
- Time Logs

HISTORY

- Activities
- Logs

Analysis Budgets PO's Bills Invoices Change Orders

Budget Name	Qty	Purchase Orders	Starting Contingency	Starting Budget	Used Contingency
> ENGINEERING & PERMITTING			\$200.00	\$3,800.00	\$0.00
> EQUIPMENT			\$10.00	\$0.00	\$0.00
> PATIO			\$20.00	\$0.00	\$0.00
> PLUMBING			\$0.50	\$9.00	\$0.00
> PRE-CONSTRUCTION			\$1,500.00	\$29,000.00	\$0.00
> UNSORTED CONTINGENCY			- \$0.00		\$0.00

CLIENT CREDITS (2 · -\$753.50 applied)

Credit #002	Approved	09/29/26
Credit #001	Approved	09/29/26