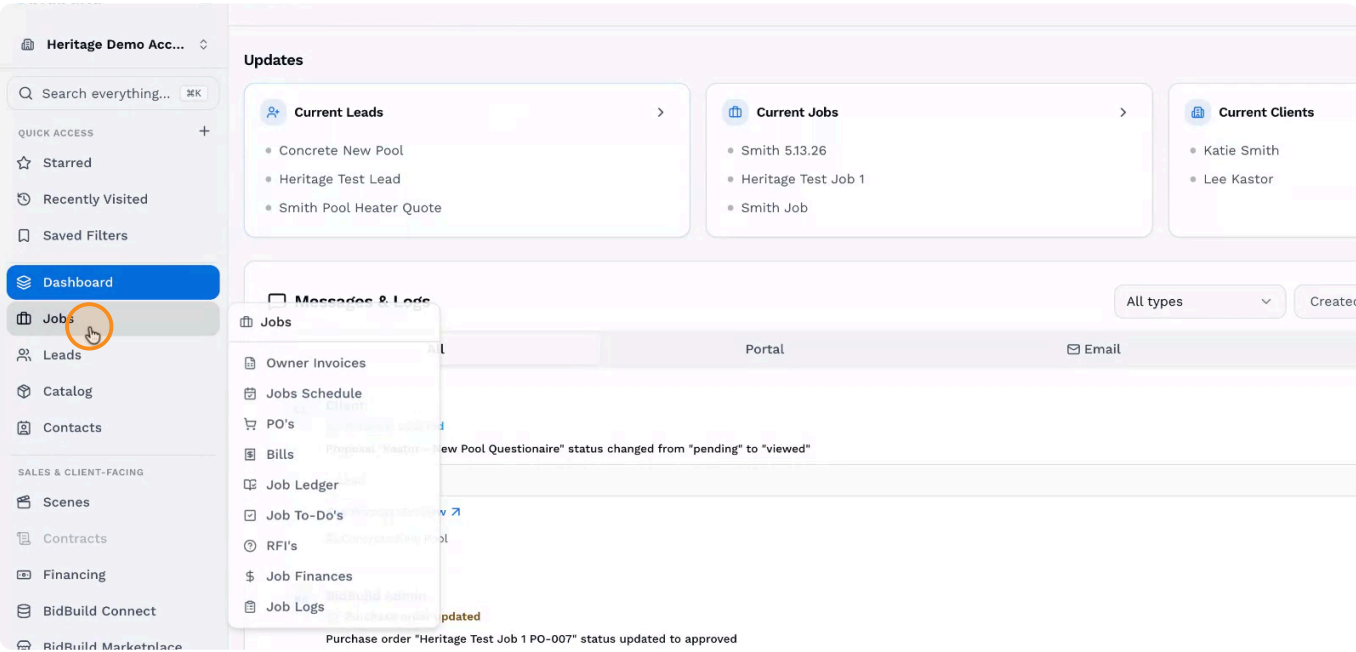


Purchasing Heritage Products via BidBuild Jobs

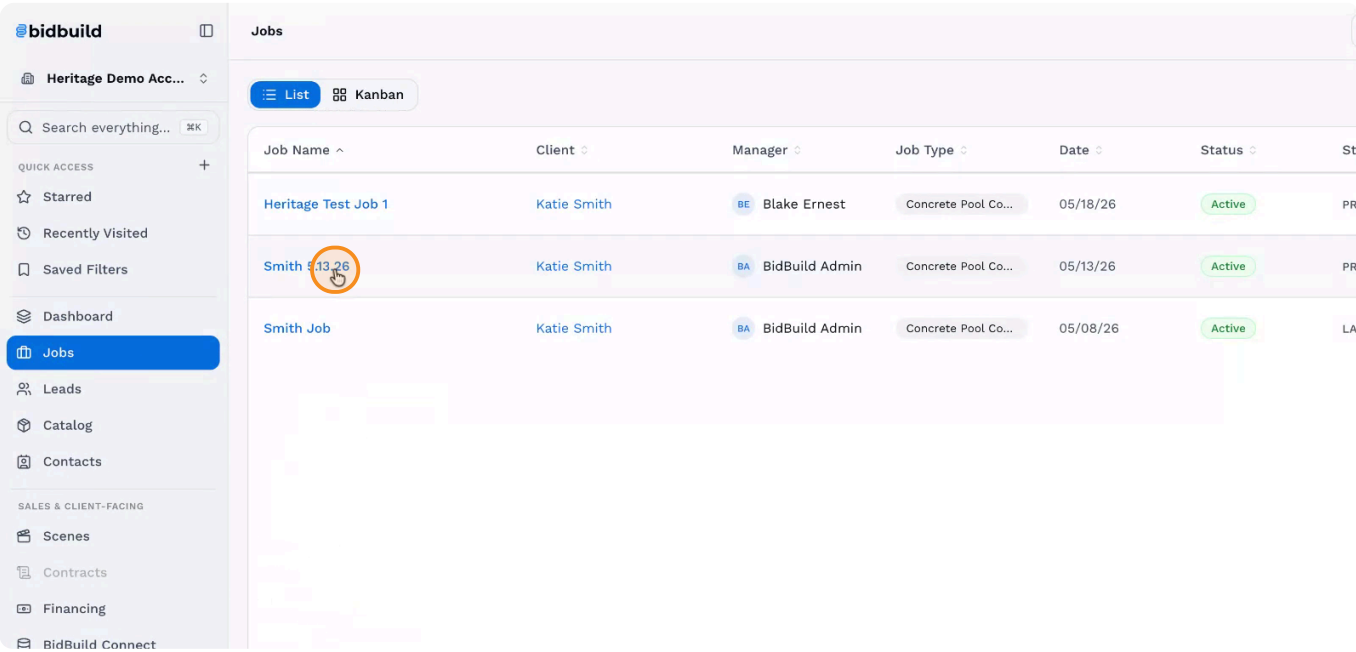
This document explains how to create and send a purchase order for Heritage products directly from a BidBuild job, including selecting products, confirming vendor details, and submitting the order to Heritage.

Step 1: Open the Relevant Job in BidBuild

Navigate to the job set page where your BidBuild jobs are listed.



From the job set page, select the specific job that you want to order products from.



Then navigate within that job to the **Finances and Budgets** section.

bidbuild Jobs > **Smith 5.13.26**

Heritage Demo Acc...

Search everything...

QUICK ACCESS

- Starred
- Recently Visited
- Saved Filters

Dashboard

Jobs

- Leads
- Catalog
- Contacts

SALES & CLIENT-FACING

- Scenes
- Contracts
- Financing
- BidBuild Connect

Quick facts

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

FIELD

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

HISTORY

- Activities
- Logs

Analysis Budgets PO's Bills Invoices Change Orders

Budgets

Budget Name	Qty	Purchase Orders	Starting Contingency	Starting Budget	Used Contingency	Actual
☐ EQUIPMENT			\$597.69	\$12,004.93	\$0.00	\$
☐ > PRE-CONSTRUCTION			\$1,500.00	\$29,000.00	\$0.00	\$
UNSORTED CONTINGENCY						
			-\$0.00		\$0.00	
UNSCHEDULED BUDGETS						
☐ > COMMISSIONS			\$0.00	\$4,920.60	\$0.00	
☐ > TAXES			\$0.00	\$4,268.31	\$0.00	
GRAND TOTAL			\$2,097.69	\$50,193.84	\$0.00	\$

Select the Heritage products that you would like to purchase.

Step 3: Create a Purchase Order

After selecting the products, choose the option **Create Purchase Order**.

bidbuild Jobs > **Smith 5.13.26**

Heritage Demo Acc...

Search everything...

QUICK ACCESS

- Starred
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Dashboard

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SALES & CLIENT-FACING

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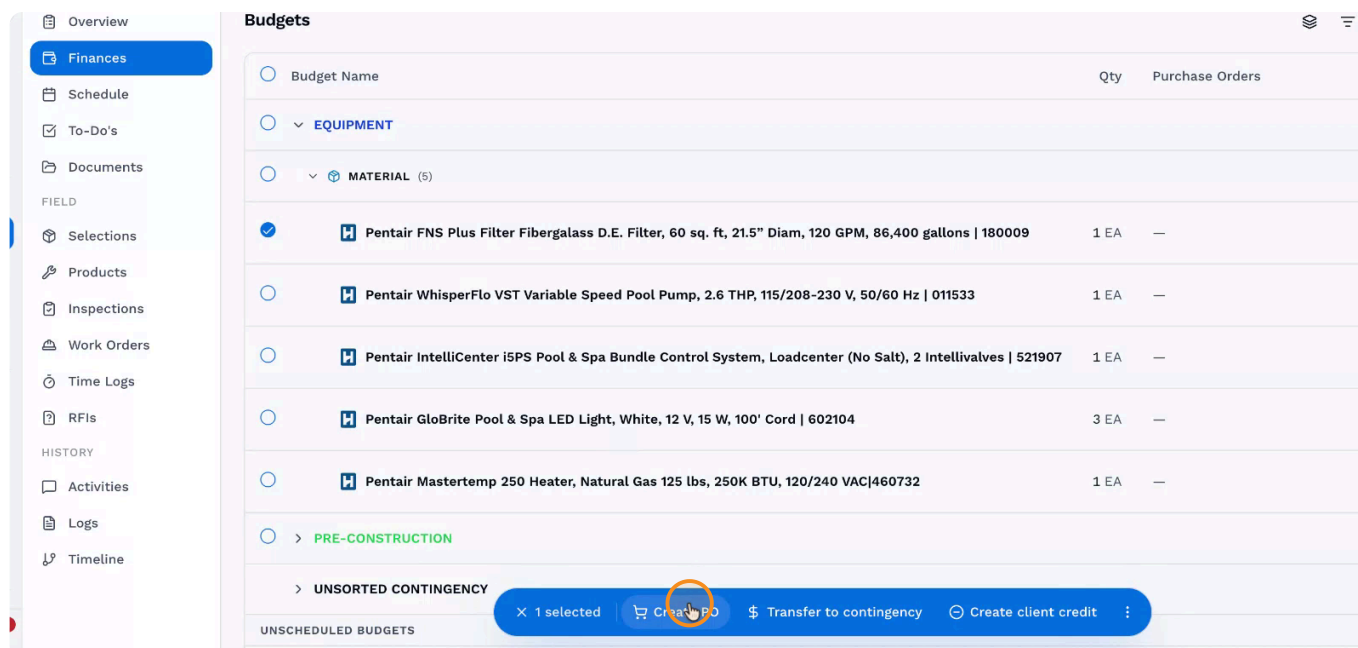
HISTORY

- Activities
- Logs

Analysis Budgets PO's Bills Invoices Change Orders

Budgets

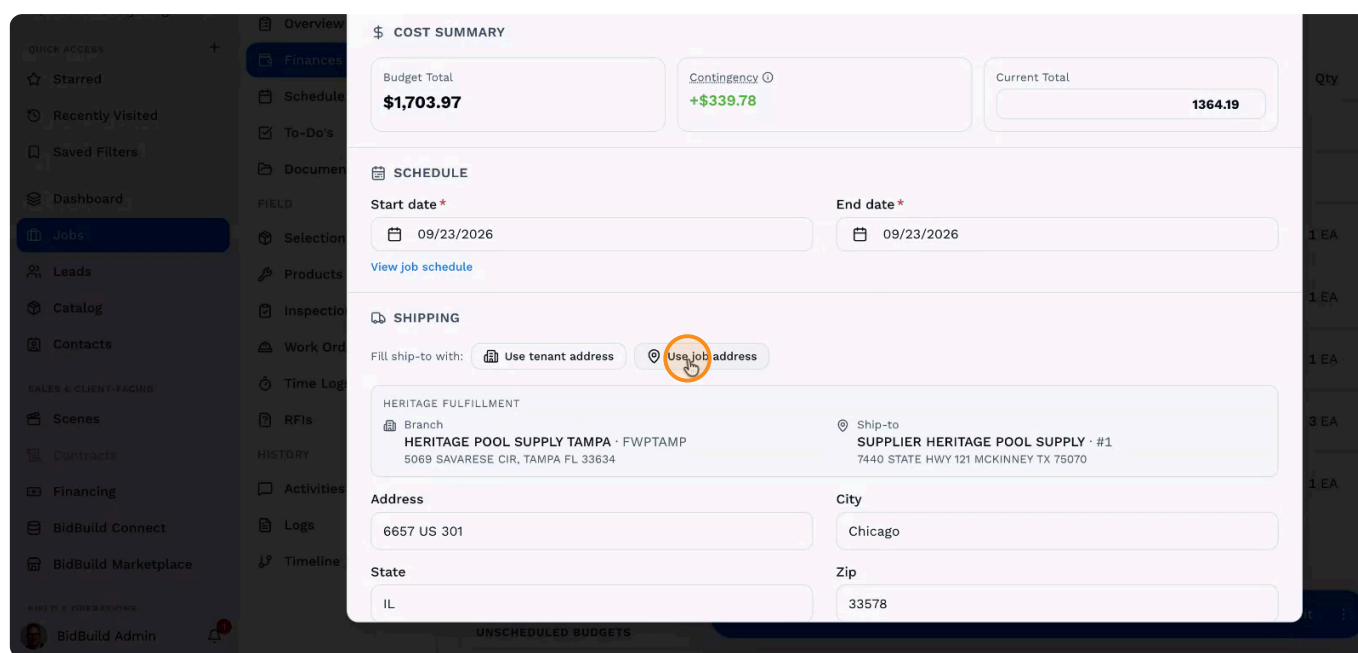
Budget Name	Qty
☐ EQUIPMENT	
☐ > MATERIAL (5)	
☒ Pentair FNS Plus Filter Fiberglass D.E. Filter, 60 sq. ft, 21.5" Diam, 120 GPM, 86,400 gallons 180009	1 EA
☐ Pentair WhisperFlo VST Variable Speed Pool Pump, 2.6 THP, 115/208-230 V, 50/60 Hz 011533	1 EA
☐ Pentair IntelliCenter i5PS Pool & Spa Bundle Control System, Loadcenter (No Salt), 2 Intellivalves 521907	1 EA
☐ Pentair GloBrite Pool & Spa LED Light, White, 12 V, 15 W, 100' Cord 602104	3 EA
☐ Pentair Mastertemp 250 Heater, Natural Gas 125 lbs, 250K BTU, 120/240 VAC 460732	1 EA
☐ > PRE-CONSTRUCTION	



Confirm that the vendor **Heritage** is already selected and that the chosen items appear correctly on the purchase order.

Step 4: Configure Shipping Address and Contact Details

Select whether you want to use the **job site address** for delivery



or use the **tenant address** instead.

\$ COST SUMMARY

Budget Total \$1,703.97	Contingency +\$339.78	Current Total 1364.19
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SCHEDULE

Start date * 09/23/2026 End date * 09/23/2026

[View job schedule](#)

SHIPPING

Fill ship-to with: ☒ Use tenant address ☐ Use job address

HERITAGE FULFILLMENT

Branch

HERITAGE POOL SUPPLY TAMPA · FWPTAMP

5069 SAVARESE CIR, TAMPA FL 33634

Ship-to

SUPPLIER HERITAGE POOL SUPPLY · #1

7440 STATE HWY 121 MCKINNEY TX 75070

Address 4583 West Main Street City Neuboldt

State TN Zip 45893

Enter all required contact information for the person responsible for the order, and add any relevant notes or special instructions.

Step 5: Submit the Order to Heritage and Track Status

When all details are correct, select **Send to Heritage Group** to submit the purchase order. This sends the order directly to Heritage for processing.

After Heritage receives and fulfills the order, you will receive a notification indicating that the product has been received by Heritage and is in the process of being shipped to your selected address.