

Manage your Budget

Summary

Keep track of your project by viewing and managing the project's budget, which is built from estimates, change orders, purchase orders, bills, and time-clocked labor. This tutorial guides you through accessing the budget, marking items as paid, and exporting reports.

Prerequisites

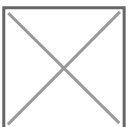
- An active BuilderPal account.
- A project with existing budget items (e.g., estimates or time entries).

Steps

1. **Access the project budget.** Navigate to <https://app.builderpal.com>, select your project (e.g., "Middleschool Staircase Renovation"), click **Site Office**, then click **Budget**.



2. **Review and mark budget items as paid.** View the project budget overview. For items linked to bills, purchase orders, or time clock labor, click **View Source** on the item, verify details, and click **Mark as Paid**.



3. **Export the budget report.** Select your preferred format: Excel, CSV, or PDF.



Confirmation

The budget item status updates to paid, and the overall budget reflects the change in real-time.

FAQ

Why can't I mark certain items as paid?

Only budget items tied to bills, purchase orders, or time clock labor can be marked as paid directly. Edit the source document for other items.

How does the budget update automatically?

The budget aggregates data from linked sources like estimates and change orders. Changes in

those documents reflect immediately in the budget view.

What if the exported file doesn't include all data?

Ensure all filters are cleared in the budget view before exporting. If issues persist, refresh the page or check your internet connection.

Can I customize the budget categories?

Budget categories are derived from project sources. To customize, adjust categories in estimates or other originating documents.

What happens if I mark an item as paid by mistake?

You can revert by viewing the source and unmarking it, but this may affect reporting—review carefully before confirming.

Related Articles

- [Create your Estimate](#)
- [Create Cost Codes / Divisions](#)

Metadata

Relevant Roles: Project Manager, Site Supervisor

Feature Area: Site Office - Budget

Article Type: Workflow / Tutorial

Revision #5

Created 5 November 2025 16:24:40 by Gabe

Updated 3 December 2025 00:21:50 by Admin