RFI, Submittal & Change Order FAQs

Webinar Q&A follow-up

FAQ 1: I received an answer from the reviewer — how do I update the RFI in BuildOps?

BuildOps does not automatically pull in the reviewer's answer — you need to update it manually. Here's how:

1. Open your project, then click **RFIs** on the left side of the page.
2. Click the **RFI number** to open it.
3. Check **Communication History** on the right side to read the reviewer's response.
4. Click **Revise** in the upper-right corner.
5. Enter the reviewer's response in the **RFI Answer** field.
6. Select the date the answer was received in the **Answer Date** field.
    - **Important:** Once an Answer Date is added, the RFI status automatically updates to "Responded."
7. Click **Save**.

Pro Tip: After the RFI is approved, click **Add to Files** to store it in your Project Files so your team — including mobile users — can access the final resolution.

FAQ 2: Why don't I see any contacts in the "Send To" dropdown when creating an RFI?

The **Send To** field pulls its contact list from the contacts set up on your **Customer page**, not from your internal employee list. If you're not seeing anyone in the dropdown:

1. Navigate to your project's **Customer** record.
2. Add the appropriate contacts there (name, email, etc.).
3. Return to your project's RFI page and try creating or editing the RFI again — the new contacts should now appear.

The **From** field, on the other hand, pulls from your **Personnel / employee list**, so those are your internal team members.

FAQ 3 — Real-World Scenario: Your foreman finds a conflict between drawings on-site. What should you do?

The situation: Your foreman is running conduit on the second floor and notices that the electrical drawings show a panel location that directly conflicts with the mechanical drawings, which show ductwork in the same spot. The foreman calls the office and says, "Hey, I can't install this panel where the drawings say — there's a 24-inch duct right there."

What to do in BuildOps:

1. If your foreman has the mobile app, they can open the project drawing, drop a pin on the conflict location, attach a photo, and start the RFI right from the field.
2. On the web, the PM opens that RFI and sees the exact location and photo. They refine the question and fill out the details:
    - **Subject:** "Conflict — Panel 2A location vs. ductwork at Grid B-4, 2nd Floor"
    - **Information Requested:** "Electrical drawing E-201 shows Panel 2A at Grid B-4. Mechanical drawing M-201 shows a 24" supply duct in the same location. Please confirm the correct panel location or advise on relocation."
    - **Impact to Timeline:** Probable
    - **Impact to Cost:** Probable
3. The PM emails the RFI directly to the GC or engineer from BuildOps.
4. When the answer comes back, the PM updates the **RFI Answer** and **Answer Date**, then clicks **Add to Files** so the crew can see the resolution.

Why it matters: Without a formal RFI, this becomes a "he said / she said" situation. If the resolution leads to extra work or rework, you now have a documented trail that supports a change order — and BuildOps automatically creates a Potential Change Order (PCO) linked to the RFI when there's an impact to cost.

FAQ 4 — Real-World Scenario: The owner verbally tells you to change something on-site. Do you still need an RFI?

The situation: You're walking a project with the building owner and they casually say, "Actually, let's move that thermostat from the hallway into the conference room instead." Your superintendent says, "Sure, no problem" — and your crew makes the change that afternoon.

Three weeks later, the GC says: "That thermostat was supposed to stay in the hallway per the approved drawings. Rip it out and reinstall it. That's on you."

What you should have done in BuildOps:

Even when the direction seems simple and low-risk, always create a **confirmation RFI** before making the change:

- **Subject:** "Confirm relocation of thermostat T-3 from Hallway 102 to Conference Room 104"
- **Information Requested:** "Per conversation with owner on-site on [date], please confirm relocation of thermostat T-3 from Hallway 102 to Conference Room 104."

This creates a written record with a timestamp, and if the owner later denies the conversation, you have documentation. If the change adds cost, the RFI links to a PCO, which you can convert into a Change Order Request.

Bottom line: RFIs aren't just for questions — they're your paper trail. If someone tells you to do something different from the drawings, document it in an RFI before you pick up a tool.

Submittals

FAQ 1: What's the difference between a Submittal Item and a Submittal Package?

This is the most common question we get — and understanding the difference is key to using Submittals effectively in BuildOps:

- A **Submittal Item** represents a specific material or piece of equipment (e.g., "Titus FPB 200-213 for review & approval"). Think of it as one line on your submittal log.
- A **Submittal Package** is the cover letter / transmittal that groups one or more Items together into a single email that gets sent to your reviewer (GC, engineer, or architect) for approval.

Key rules to remember:

- Every Item must belong to a Package before it can be sent.
- One Package can contain one or many Items.
- You can create Items at any time — even before you're ready to send them — so they act as a running submittal log on the project.

FAQ 2: Why aren't some of my attachments showing up in the Submittal Package PDF?

BuildOps currently only supports **PDF and image files** (JPEG, PNG, etc.) in the final generated Submittal Package PDF document. If your attachments are in .docx, .xlsx, or other unsupported formats, they will not appear in the Package PDF — they'll be silently excluded.

What to do:

- Convert any Word documents, Excel files, or other non-PDF attachments to PDF format before uploading them as Submittal Item attachments.
- This ensures your reviewer sees the full picture when they open the Package PDF.

FAQ 3 — Real-World Scenario: Your crew installs a light fixture before the submittal is approved — and the architect rejects it.

The situation: Your purchasing team orders Acme Model 500 recessed LED fixtures because they're readily available and seem to match the spec. The crew installs twelve of them on the third floor. A week later, the architect reviews the submittal package and rejects it: "This fixture does not meet the color rendering index (CRI) requirement in Spec Section 26 51 00. Replace with an approved fixture."

Now you're looking at labor to remove twelve fixtures, restocking fees (if the vendor even takes them back), new material costs, and schedule delay — all because the submittal wasn't approved before installation.

How BuildOps helps you avoid this:

1. As soon as you know you'll need to submit a fixture for approval, create a **Submittal Item** in BuildOps with the spec section, description, and cut sheet attached.
2. When you're ready, create a **Submittal Package**, add the Item(s), and email it to the architect or GC directly from BuildOps.
3. Track the Package status — Draft, Sent, Responded, Approved — so you always know where things stand before you order or install anything.
4. Once approved, click **Add to Files** so your field team can pull up the approved submittal on their phone to verify they're installing the right product.

The rule of thumb: Never install anything that requires a submittal until the submittal status says **Approved** in BuildOps. The cost of waiting is always less than the cost of ripping it out.

FAQ 4 — Real-World Scenario: The GC responds "Approved as Noted" — what does that mean and what do I do?

The situation: You submitted a package for VAV boxes on a mechanical project. The GC responds: "Approved as Noted — verify duct connection sizes match approved mechanical schedule before ordering." Your PM isn't sure if that means they can order or if they need to resubmit.

What "Approved as Noted" means:

It means the submittal is approved, but with conditions or minor corrections noted by the reviewer. You can typically proceed with ordering and installation, as long as you address the notes. However, always read the reviewer's specific notes carefully — some "Approved as Noted" responses include requirements that must be resolved before you proceed.

What to do in BuildOps:

1. Open the Submittal Package and check **Communication History** to read the reviewer's full comments.
2. Click **Edit** and update the Package status to **Approved as Noted**.
3. Update each individual **Item status** within the Package to reflect the reviewer's decision (some Items may be fully approved, others may have notes).
4. Click **Save**.
5. Click **Add to Files** so your purchasing and field teams can see the approved-with-notes status and read the conditions before ordering or installing.

Pro Tip: Don't forget to notify your purchasing team and relevant field crew that the submittal has been approved so they can proceed. BuildOps doesn't send automatic notifications to your internal team — that's on you as the PM.

Change Orders

FAQ 1: What's the difference between a Potential Change Order (PCO) and a Change Order Request (COR)?

These are two stages of the same workflow — think of it as early tracking vs. formal pricing and approval:

- A **Potential Change Order (PCO)** captures an early conversation or possible scope change before anything is official. For example, a superintendent mentions on-site that they're "thinking about adding three additional rooms to this floor." Nothing is priced or sent to the customer yet — you're just documenting the possibility.
- A **Change Order Request (COR)** is the formal, priced request that you create, detail with costs and pricing by cost type, and send to your customer for approval. Once approved, it becomes an official Change Order that updates your project's contract value and budget.

BuildOps can automatically create PCOs for you in two ways:

1. **From RFIs** — When an RFI is created with an impact to cost, BuildOps auto-generates a linked PCO.

2. **From Daily Reports** — When someone enters anything in the Out-of-Scope Work field, a PCO is automatically created.

When you're ready, you can convert a PCO directly into a COR with one click, and BuildOps carries over all the information.

FAQ 2: How do I control what financial details the customer sees on the Change Order document?

When you click **Generate Document** on a Change Order Request, BuildOps opens a PDF preview with a **Configuration panel** on the right side. This is where you choose the level of detail:

Option	What It Shows
All Details	Line-level detail including Tax %, Overhead %, and Profit %
Section Subtotals	Section-level totals (e.g., total Labor, total Material) — can also expose percentages
Grand Total	A single total amount only — no breakdown

Be very careful: Selecting "All Details" or "Section Subtotals" can expose your internal markup, overhead, and profit percentages to the customer. If you don't want the customer to see how you priced the change, use **Grand Total** or toggle off the percentage fields before sending.

FAQ 3 — Real-World Scenario: Your crew hits unforeseen conditions — concrete where the drawings showed drywall. What's your move?

The situation: Your electricians are roughing in on the first floor and need to run conduit through what the drawings show as a standard drywall partition. When they open it up, they find a 12-inch concrete masonry block wall that was never on the plans. Core drilling through CMU takes specialized equipment, more labor, and a concrete cutting subcontractor. This was never in your bid.

What to do in BuildOps:

1. **Document it immediately.** Your foreman should take photos of the wall, the drawing detail that shows drywall, and the actual field condition. If they're using the mobile app, they can log this in the **Daily Report** under the **Out-of-Scope Work** field — which automatically creates a PCO in BuildOps.
2. **Open the auto-created PCO** on the web. Review the field notes BuildOps pulled in. Add cost and price estimates (e.g., $1,200 for core drilling sub, $800 for additional labor).
3. **Convert the PCO to a COR** when you're ready to formally price it. BuildOps carries everything over — scope, reference documents, estimates.
4. **Build out the COR pricing** under the appropriate cost types: Subcontractor (core drilling), Labor (additional electrician hours), and possibly Equipment.
5. **Attach the photos** of the field condition and the conflicting drawing detail under the Attachments tab.
6. **Generate the document** using "Grand Total" or "Section Subtotals" (so you don't expose your markup), and email it to the GC.

Why this matters: Unforeseen conditions are one of the most common — and most disputed — reasons for change orders in construction. Having timestamped photos, a Daily Report entry, and a formal COR with backup in one system gives you the documentation you need to get paid and defend your position if there's a dispute.

FAQ 4 — Real-World Scenario: The GC says "Go ahead and start the work" but won't sign the change order yet. What do you do?

The situation: You submitted a COR for $14,000 to add fire alarm devices in a new tenant space. The GC project manager calls and says, "We need you to start Monday — the owner wants this done before the inspection. I'll get the signed change order to you next week." Your PM is stuck: if you wait, you miss the inspection window and damage the relationship. If you start without written approval, you risk never getting paid.

How BuildOps helps you manage this:

1. Open the COR in BuildOps and click **Edit**.
2. Use the **Verbal Go-Ahead** dropdown and select **Proceeding**.(if you company allows this)
3. This documents that a verbal authorization was given, even though written approval hasn't come through yet.
4. Add a note in the **Scope of Work** or **Activity** section documenting who gave the verbal go-ahead, when, and what they said.
5. **Do not approve the COR yet** — leave it in "Sent for Approval" status until you receive written confirmation.

Important: Always follow your company's policy on verbal go-aheads. Some companies require a minimum dollar threshold for verbal authorization, and others require it in writing no matter what. BuildOps gives you the tools to track it either way — but it's your company's risk tolerance that determines whether you start work.

Pro Tip: If the GC drags their feet on signing, the Communication History tab in BuildOps gives you a clear email trail showing when you sent the COR and any follow-ups. That trail can be critical if you end up in a billing dispute six months later.