

Frame and Forge — Role and Workflow Guide

By Tristin Hassell

Keep construction job records together, with access matched to the person doing the work.

Start with one job

Create an evaluation workspace with sample records. Add a job and give each person appropriate access. Enter the estimate, tasks, and supporting documents. Record photos, progress, and questions. Review client updates before publication. Keep a complete backup before adding real business records.

Owners and administrators

Set up the company, invite people, manage account access, and choose who can see sensitive records. Keep backups and review account activity. Administrative access is separate from authority to approve work or see project finances.

Office managers and program directors

See the jobs you manage, review estimates and costs, coordinate schedules and purchases, handle approvals, and publish client updates. Keep the estimate, decision, and supporting records together.

General contractors and project managers

Run assigned jobs: plan tasks and prerequisites, prepare estimates, request materials, record issues, and review field reports. Prepare updates for the office to review and publish.

Crew leads and crew members

Find assigned work, check the site details, take photos, record daily progress, and flag a blocker or missing material. Crew access follows the jobs and tasks assigned to that person.

Subcontractors

Use the issued information for assigned work. Submit photos, progress, questions, and proposed changes without opening unrelated jobs or the company's internal margin records.

Clients and homeowners

See the progress, photos, documents, and decisions the company has published for their job. Ask questions and acknowledge updates. Private field records and internal costs stay outside the client view.

Jobs and next actions

Keep each job's people, stage, address, tasks, and records together. Use due dates, prerequisites, and recorded crew availability to plan the next step.

Estimates, proposals, and invoices

Build estimates from quantities and entered prices. Compare cost scenarios, prepare proposals, and keep invoice and payment records with the job.

Photos and field reports

File photos by job and category. Add captions, record progress and blockers, and keep submitted reports linked to the evidence they refer to.

Documents, permits, and decisions

Keep document versions and review history. Organize permit paperwork and record the decision, responsible person, and supporting information.

Client updates

Prepare a separate customer view. Choose the wording, photos, and records to publish instead of exposing the whole project folder.

Backups and exports

Keep the workspace in a folder you choose. Export reviewed records and preserve the database, documents, photos, and keys together in a complete backup.

Offline and optional agents

Core office tools work without public internet. Forge Field keeps downloaded assignments, reports, and photos on a phone while offline; reconnect to get updated work and sync. An approved agent can look up permitted information and prepare supported drafts. Business approvals, signatures, publication, purchasing, and payments stay with authorized people.

Devices

The current Apple silicon Mac pilot requires macOS 26 or later. Earlier Intel Mac and Windows installers are retained for evaluation. iPhone, iPad, and Android use the configured browser/Home Screen field companion; standalone mobile store apps are not offered yet.

Testing, licensing, and support

Contact Tristin through gatheredcommonspress.com/contact. Tell me your role, devices, and the task you want to try. Leave private records out of your first message.

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