

smart

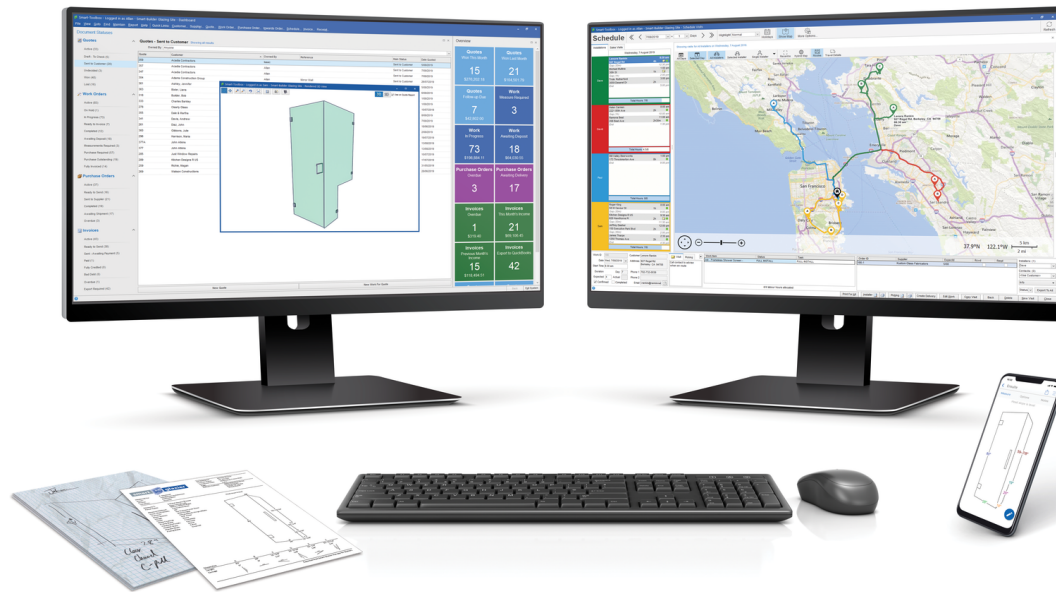


builder

SMART-TOOLBOX

MANAGE ALL ASPECTS OF YOUR
GLASS BUSINESS WITH ONE SYSTEM

THE BEST WAY TO RUN YOUR GLASS BUSINESS



Smart-Toolbox is a job management system that has been purpose-built for the glass industry and understands glass job pricing better than any other software. There are plenty of ways that Smart-Toolbox can make running your glass business easier and more enjoyable.

Quoting: Fast, beautiful quotes to help you win more jobs

Scheduling: Drag and drop to assign your staff to jobs and schedule their time

Ordering: Speed up your process and send machine ready files to your suppliers

Accounting: Easily generate invoices and sync with your accounting system

Reporting: Understand and manage your business with advanced reporting and easy to understand dashboards

BETTER QUOTING

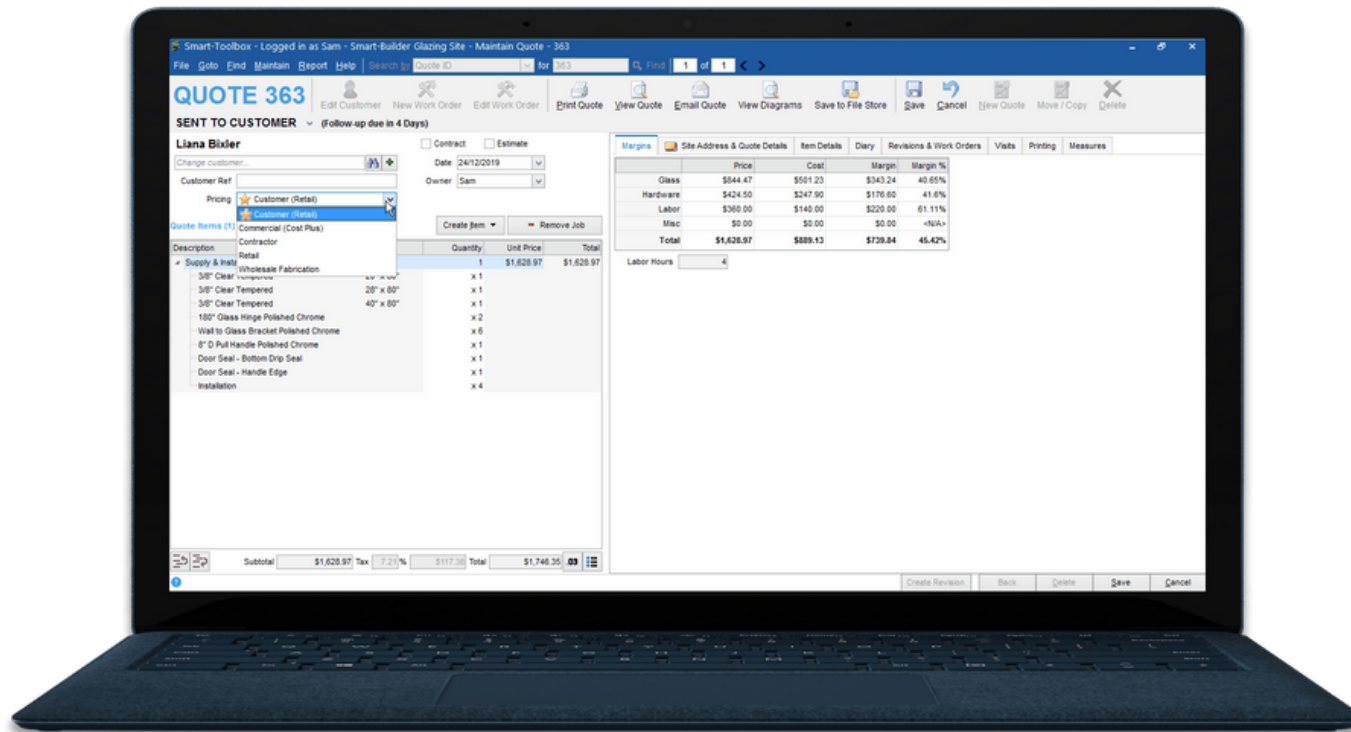
Professional, attractive quotes,
no matter who creates them.



When you can get incredible looking quotes back to your customers in less time you will win more jobs. Smart-Toolbox makes this easy for any team member. You can trust that the information is correct and when your customer is reviewing their options you stand out as the most professional and the obvious choice.

PRICING & MARGINS

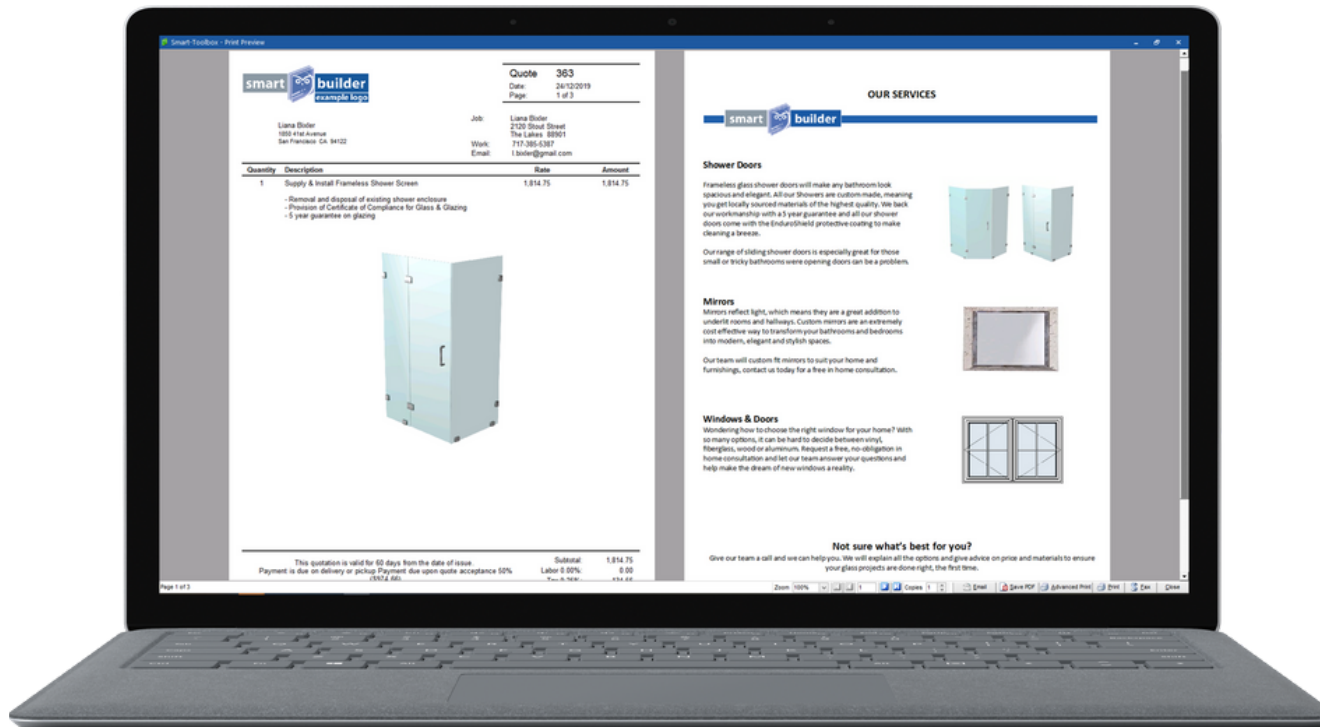
Customer specific pricing means you get accurate quotes every time.



Give your team the power to quote with confidence. Smart-Toolbox means consistent, accurate pricing, which in turn means you keep a consistent, healthy margin. Users can switch between using standard price lists, customer specific overrides and marking up from cost. See your margins update in real time and protect your bottom line.

FLEXIBLE OPTIONS

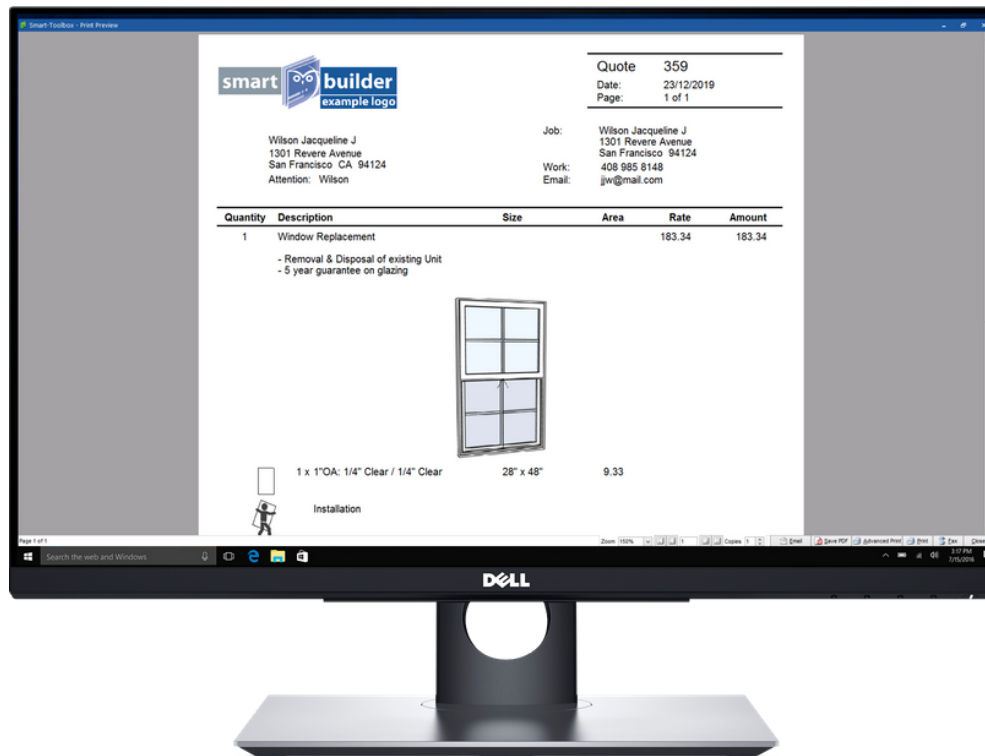
Choose a different appendix to add valuable information to every quote.



Quote Appendices are a fast and flexible way to include terms and conditions or to up-sell your products and services to your customers. Build your library to assign defaults to each customer or use the drop down selector to switch it up at the time of quoting.

MAKE AN IMPACT

Add images from the library or load your own and impress your customers.



Smart-Toolbox comes with a range of quote images designed to make an impact. If you want to add your own touch, it's easy to add new images to the library that showcase your work and your products. New and inexperienced employees can produce quotes that look like they were done by seasoned professionals.

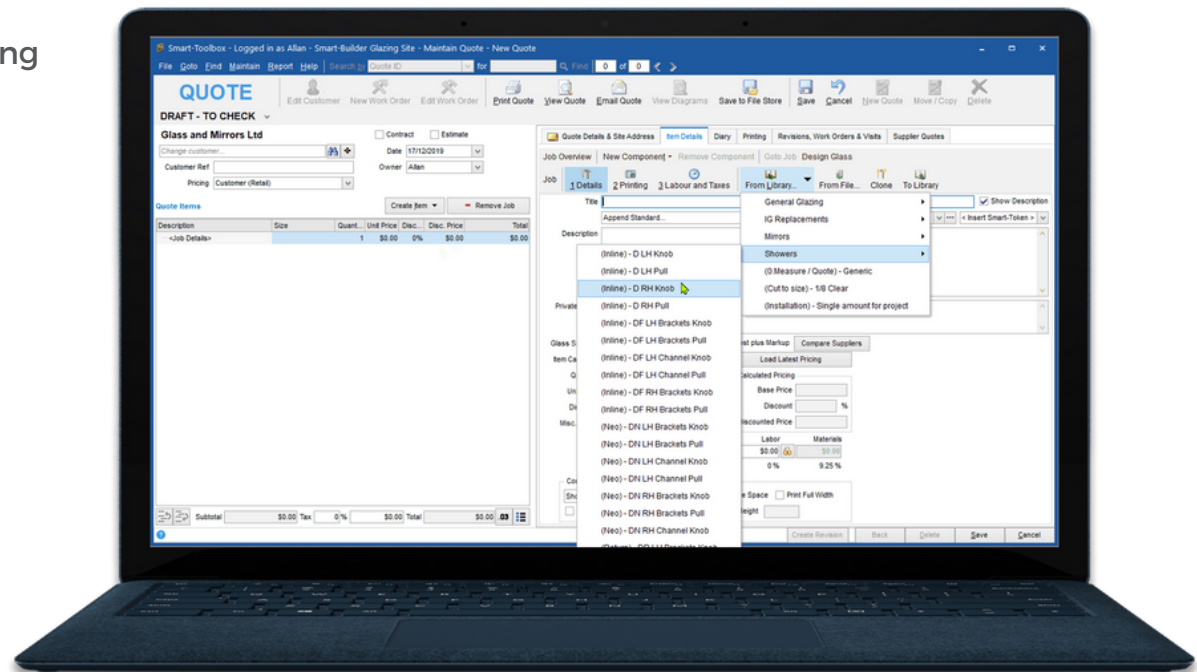
QUICK QUOTES

Build your job and glass libraries to quote common jobs in seconds.

Smart-Toolbox has a built-in job and glass pane library to help your staff quote efficiently and accurately. Senior staff can set up templates that contain all the important details, making it fast and simple for your whole team to price out your most common jobs.

Let us show you how to quote the following job types in seconds:

- Showers
- Mirrors
- Window replacements
- Fogged IG replacements
- Table-tops
- Pet doors
- Screen repair
- Screen replacements
- Automotive jobs
- Emergency call-outs
- And anything else you might need...



QUICK REVISIONS

Revise quotes in seconds to keep even the most demanding customers satisfied.



With Smart-Toolbox you can create unlimited revisions and email one or all of them straight to your customer. Quote revisions are copies of the original so it's easy to see previous versions and convert them to orders.

Ready for a demo?
Click here, enter a few details
and we'll show you Smart-Toolbox

SCHEDULE YOUR TEAM

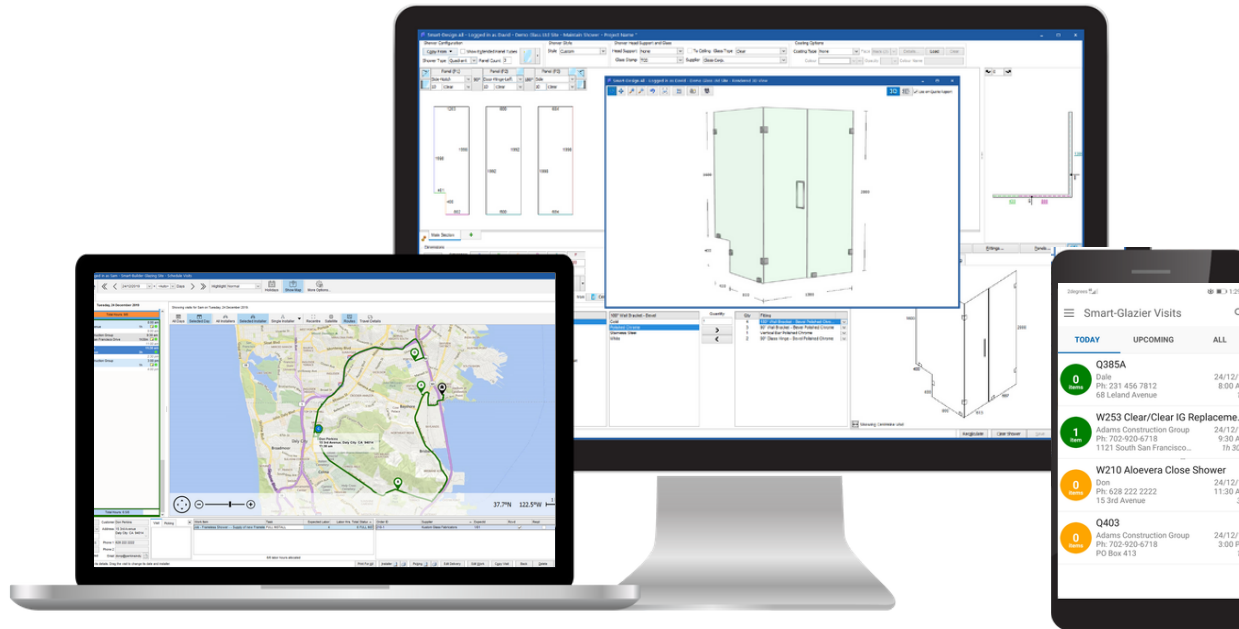
See the full picture with all your resources and job information in one place.



It's easy to **drag and drop** visits in our powerful scheduling tools, built directly into Smart-Toolbox. **See a full view of the day, week or month for each of your team members** and make sure you are maximizing their time with efficient planning.

NO BOUNDARIES

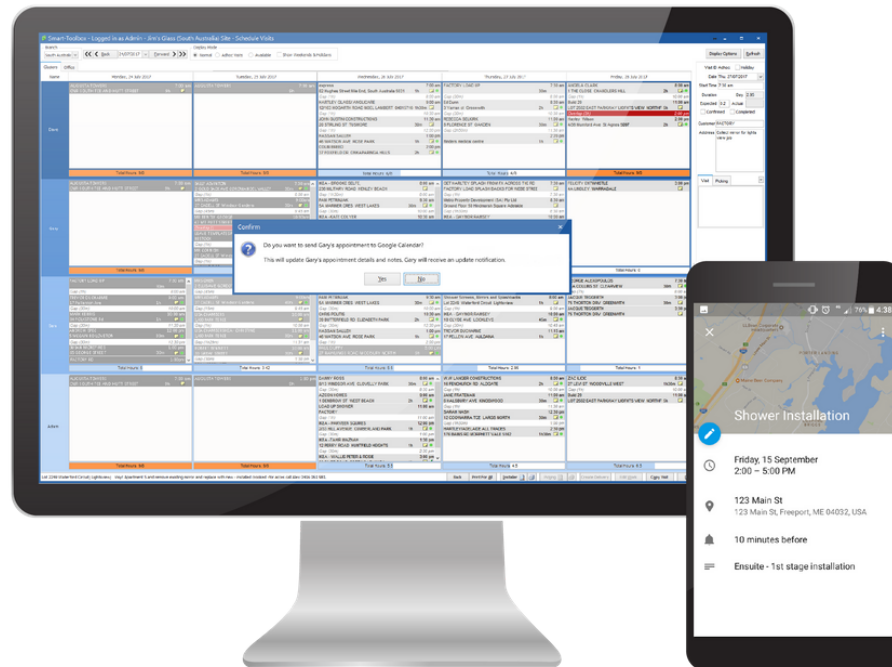
With fully integrated scheduling, Smart-Toolbox will save your staff time in the office, and in the field.



Efficiency in business is often about small, incremental improvements. Save time by removing the need to manually retype your customer's address and contact details. Use a drag and drop tool to quickly move visits between days or installers, and see visit routes and travel times with our mapping integration.

FOR YOUR WHOLE TEAM

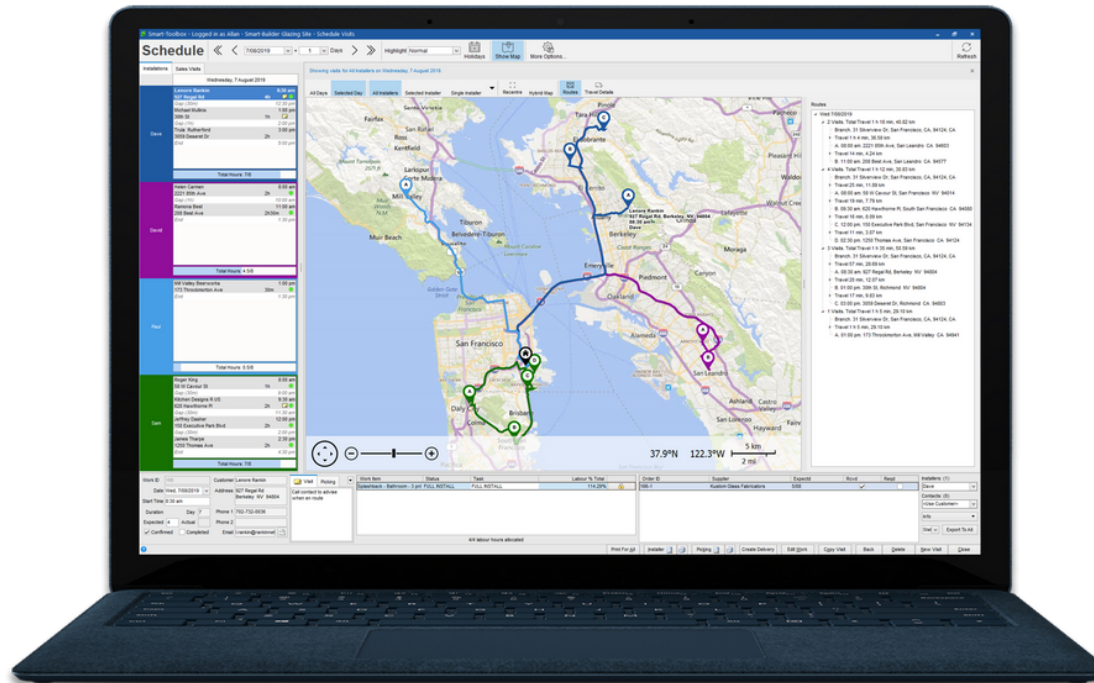
Make it easy for your whole team to check existing visit details or to book in new ones.



If your staff need to get up from their desk or disrupt another team member every time a customer calls to book a visit or enquire about an existing one, then not only do you look less organized to your customers, but you are throwing away minutes that will add up to hours, and eventually weeks over the course of a year.

PLAN YOUR ROUTES

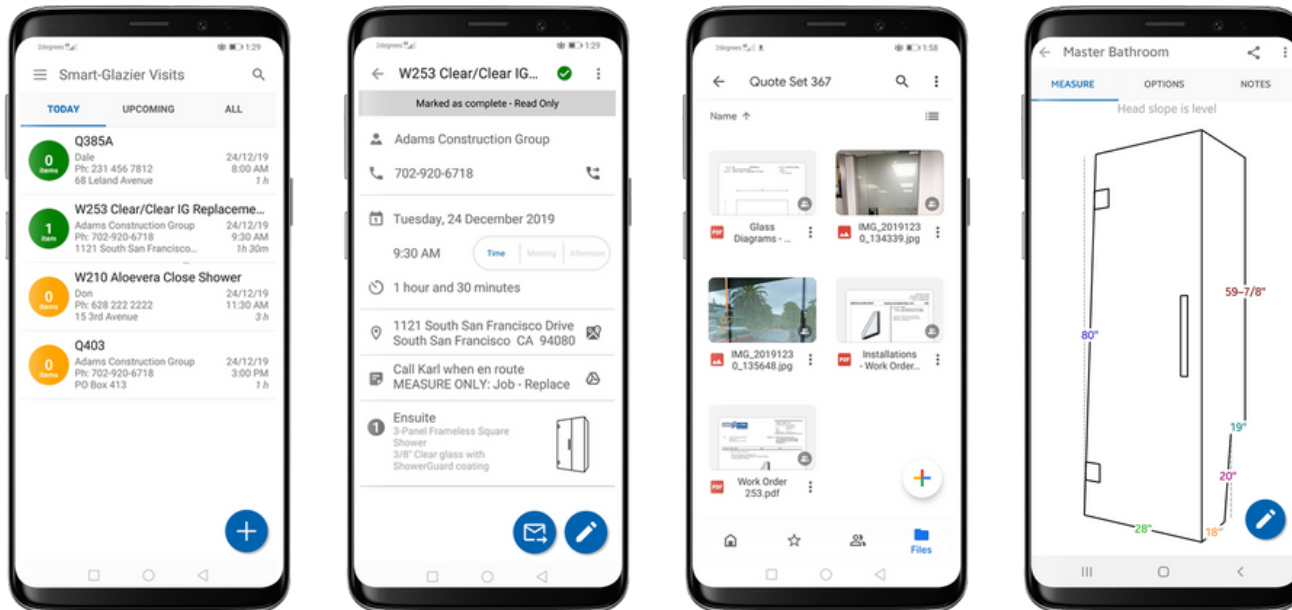
Give your team the tools they need to do a good job when scheduling.



Planning an efficient route for every installer, every day of the week, takes time. Give your team the tools they need to make this job easy. Smart-Toolbox has a built in map view complete with estimated travel times and distances. Better planning with less surprises, makes life easier for your team and your customers.

OFFICE & FIELD

Keep communication between the office and field open and get updates in real-time.



With our free Smart-Glazier app your field staff can see where they need to be, when they need to be there and most importantly, what they need to do. Field staff can access all job files while on the road and even upload their own notes and photos from site. Once a job is finished they can mark the visit as complete and enter how many hours they spent there.

SEE TEAM AVAILABILITY

Instantly see which team members are available to take over or help out on a job.

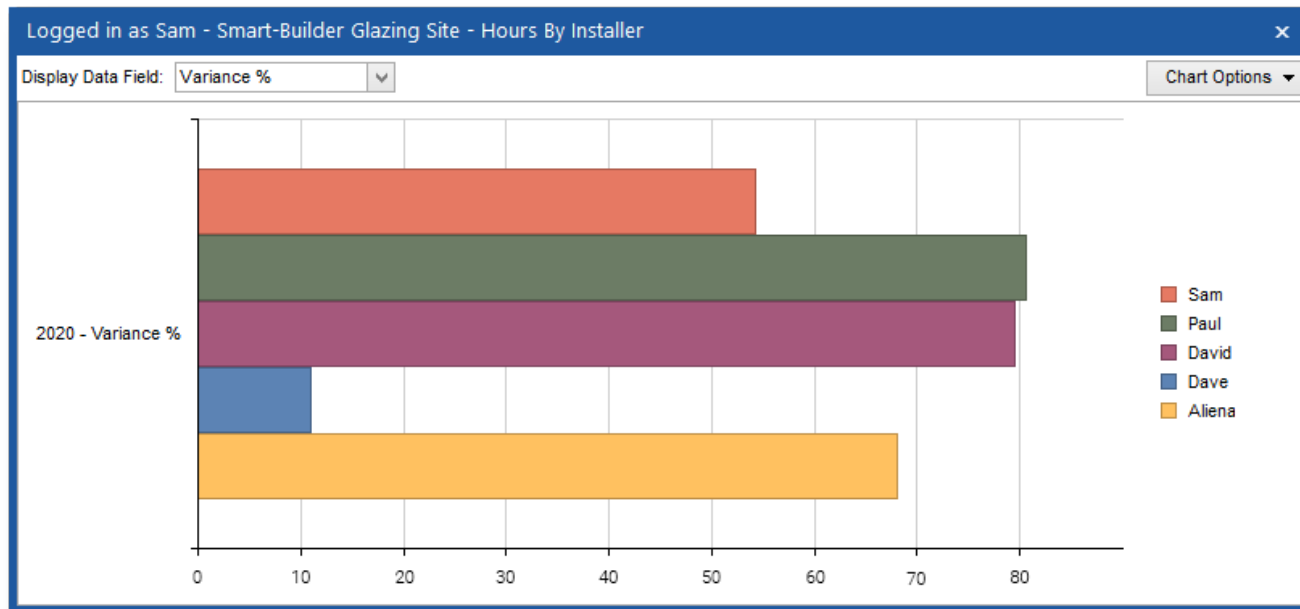
Installer	Attend	Primary	Conflicting Visits
Schedule : Installations			
Dave	<input type="checkbox"/>	<input type="checkbox"/>	
David	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	8:00 am Lawton Building Ltd
Paul	<input type="checkbox"/>	<input type="checkbox"/>	8:00 am Watson Constructions
Sam	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Schedule : Sales Visits			
Aliena	<input type="checkbox"/>	<input type="checkbox"/>	
Allan	<input type="checkbox"/>	<input type="checkbox"/>	
Gareth	<input type="checkbox"/>	<input type="checkbox"/>	
Isaac	<input type="checkbox"/>	<input type="checkbox"/>	

Ready for a demo?
Click here
enter a few details
and we'll show you
Smart-Toolbox

When unexpected problems occur your staff are often under pressure to make decisions to solve them. Installers get sent back and forth across town to satisfy customers and opportunities get missed because it was too hard to see them. Having the right tools on hand to easily switch up your daily schedule will save you time and it will save you money.

REPORT ON JOB HOURS

Understand which jobs and which installers are making you money.

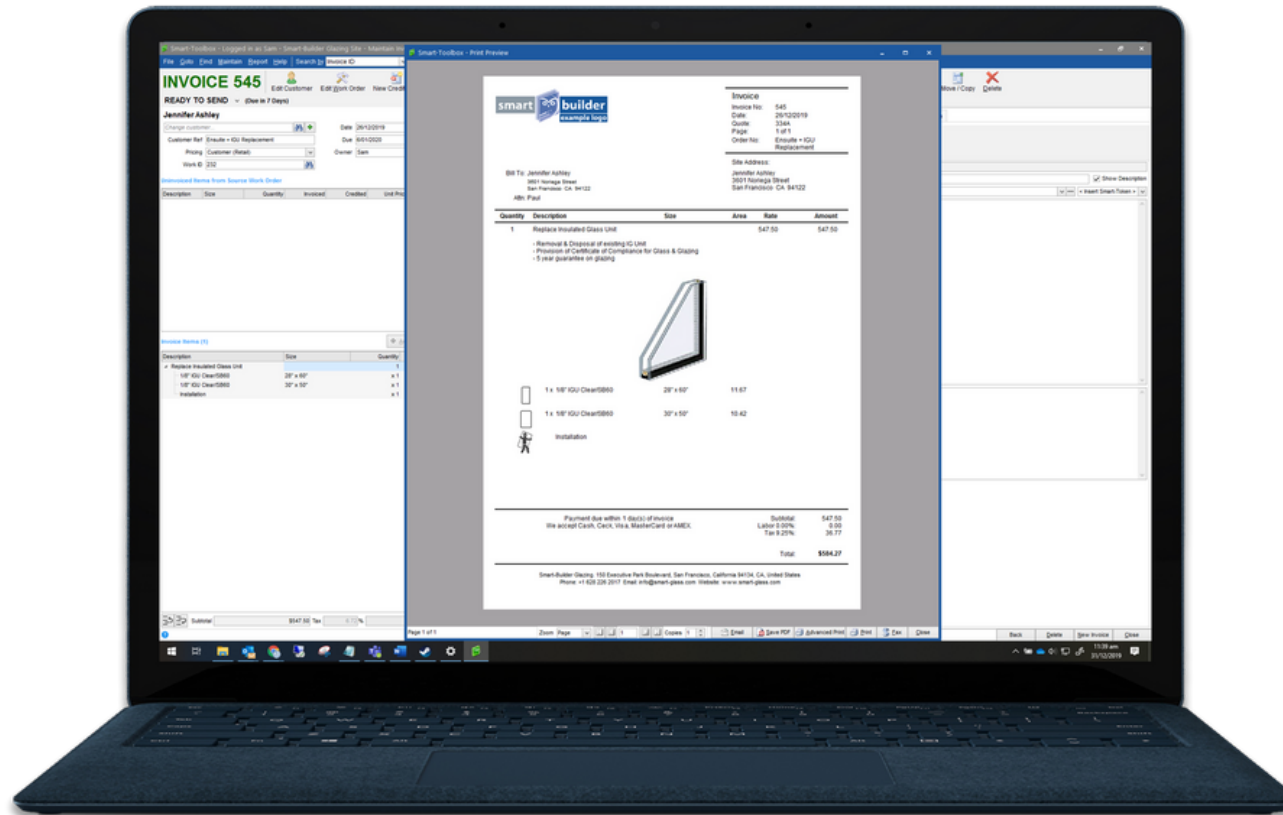


Labor is one of the hardest resources to track. Smart-Toolbox compares the hours you quoted against the hours you actually used, to give you accurate reports on your labor profitability per job and per installer.

Give yourself the tools to see which jobs and which staff are doing great, and which ones need help.

ONE-CLICK INVOICING

Create, review and email invoices in seconds



With a single centralized system anyone in your team can create and send an invoice in seconds. Get paid faster, reduce debtor days and send emails directly from Smart-Toolbox with templates and invoices customized for your business.

INVOICE STATUSES

What is ready to invoice, what's been sent, what's due for payment and what's overdue.

INVOICE 545

READY TO SEND ^ Set by Sam, today at 11:43 a.m.

Main Status	Sub-Statuses
Draft - To Check	<input checked="" type="checkbox"/> Export Required
Ready to Send	<input type="checkbox"/> Has Credit Notes
Sent - Awaiting Payment	
Paid	
Fully Credited	
Bad Debt	



Overview

Quotes Won This Month 15 \$276,202.18	Quotes Won Last Month 21 \$104,561.79
Quotes Follow-up Due 7 \$42,802.00	Work Measure Required 3
Work In Progress 73 \$198,884.11	Work Awaiting Deposit 18 \$64,030.55
Purchase Orders Overdue 3	Purchase Orders Awaiting Delivery 17
Invoices Overdue 1 \$319.40	Invoices This Month's Income 21 \$69,100.45
Invoices Previous Month's Income 15 \$118,494.51	Invoices Export to QuickBooks 42

Use the dashboard to monitor the statuses that are most important to you. See the numbers for each status update automatically, in real time as work is completed. Know which jobs to chase and prioritize, where to allocate your staff resources and where your business could be making more money.

CUSTOMER PRICING

Create multiple price lists for different customer types, or give customers their own private pricing

Price Book Pricing Details

Standard Pricing	Product Pricing Group	Price List	Discount	Further Details
Glass	Glass Fabrication	Retail	0%	No
	Glass Products	Retail	0%	No
	Hardware	Retail	0%	No
Processing	Labor	Contractor	0%	No
	Miscellaneous	Retail	0%	No
Products	Travel	Retail	0%	No

Customers Using This Price Book

Customer
Jacqueline J, Wilson
Dasher, Jeffrey
Zielinski, Nancy
Bouton, Isaac
Richie, Magan
Diaz, John
Wooldridge, Ruth
Patterson, Alexander
George, James
James, Donna
Williams, Byron
Horton, Nathan
Corder, Clark
Davis, Andrew
Fuentes, Clarissa
Moore, Charles
Rankin, Lenore
Carmen, Helen
Burns, Eric
Bixler, Liana
King, Roger

Maximize your margins and reward loyal customers at the same time. Easily build pricing groups for your different customer segments and adjust the prices they pay for different services. Quickly review which customers are paying those rates and adjust as needed to win more jobs.

AGING REPORTS

CREDIT LIMITS

Take control over who can set credit limits and who can override them.

Account Summary

Retention	\$0.00
Over 90 Days	\$0.00
Over 60 Days	\$0.00
Over 30 Days	\$0.00
Current Due	\$14,814.30
Month To Date	\$12,617.26
Total Unpaid Invoices	\$27,431.56
Unallocated Receipts	\$2,550.00
Total Outstanding	\$24,881.56

The customer management screen in Smart-Toolbox makes it easy for you to see your totals per customer for whats in progress, whats due and whats past due.

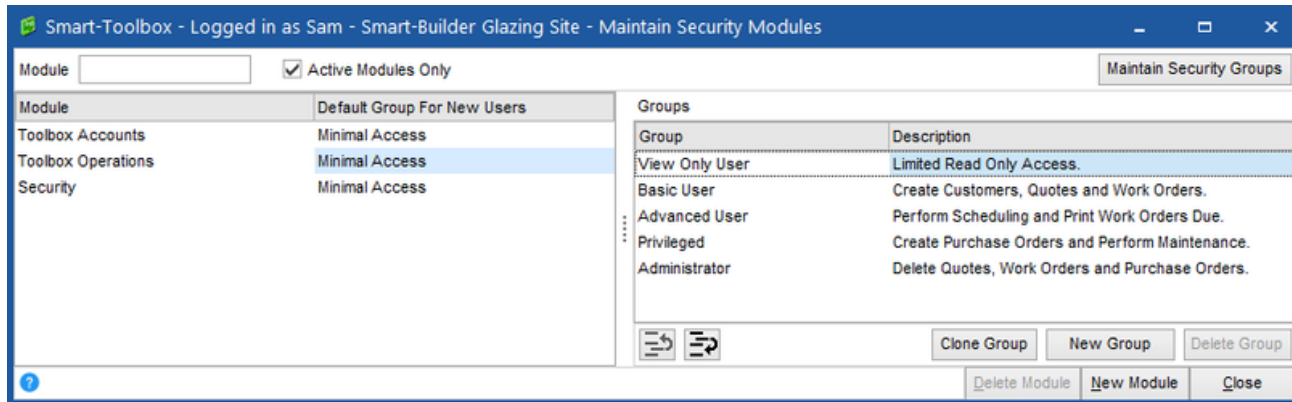
Set and adjust credit limits per customer and setup security profiles to help control who has authority to override them.

Credit Details

Outstanding In Progress	\$19,997.50	
Credit Limit	\$50,000.00	<input type="checkbox"/> Credit Risk

COMPLETE CONTROL

Security groups in Smart-Toolbox give you the confidence and control you need to let your staff work autonomously.



Use our predefined security groups or create your own custom groups to control exactly what your team can and can't do without approval.

USER HISTORY

See which team member created, modified or deleted a document.

Action	User	Date & Time	Screen	ID
Modify	Allan	20/11/2019 7:24:52 a.m.	Maintain Shower Styles	Standard Range
Create	Allan	20/11/2019 7:24:18 a.m.	Maintain Shower Styles	Standard Range
Modify	Allan	20/11/2019 7:25:38 a.m.	Maintain Shower Styles	Standard Channel
Create	Allan	20/11/2019 7:25:16 a.m.	Maintain Shower Styles	Standard Channel
Modify	Allan	19/11/2019 9:30:04 a.m.	Maintain Settings	Return Thickness
Modify	Kenny	17/02/2020 2:16:57 p.m.	External Interface	Quickbooks Online
Modify	Kenny	17/02/2020 2:16:24 p.m.	External Interface	Quickbooks Online
View	Allan	19/11/2019 9:30:27 a.m.	Shower	New Work Order, Bathroom
View	Allan	19/11/2019 9:29:15 a.m.	Shower	New Work Order, Bathroom
View	Allan	19/11/2019 9:27:16 a.m.	Shower	New Work Order, Bathroom

With Smart-Toolbox you always know which team member last worked on a document. Stay in control of your business with change management tools, including the option to use security permissions for different users.

INTEGRATIONS

**Sync up with your accounting software and
eliminate double handling**



Sync customers automatically between programs. View the invoice number, amount and tax in your accounting system. Reconcile deposits and payments from your accounting system to Smart-Toolbox, with the click of a button.

SCHEDULE A DEMO

**Smart-Toolbox is the complete glass
job management system!**

**Click below to request a demo and one
of our team will be in touch to show you
how we can help your glass business.**

REQUEST DEMO

info@smart-builder.com - 628.226.2017

smart



builder

QUOTE

SCHEDULE

ORDER

INVOICE

REPORT

MANAGE