# smart builder builder Banage all aspects of your class 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**

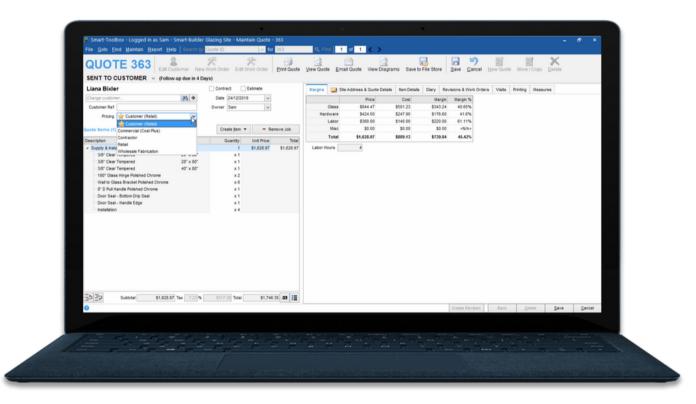
#### Professional, attractive quotes, no matter who creates them.



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 specifc 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 - Print Preview					- 0 ×
	smart bio builder		Quote         359           Date:         23/12/2019           Page:         1 of 1		
	Wilson Jacqueline J 1301 Revere Avenue San Francisco CA 94124 Attention: Wilson	Job: Work: Email:	Wilson Jacqueline J 1301 Revere Avenue San Francisco 94124 408 985 8148 jjw@mail.com		
	Quantity Description	Size	Area Rate	Amount	
	1 Window Replacement		183.34	183.34	
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**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.

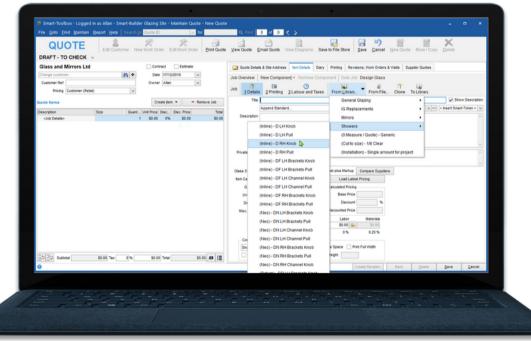


#### Build your job and glass libraries to quote common jobs in seconds.

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...





#### 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.

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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**

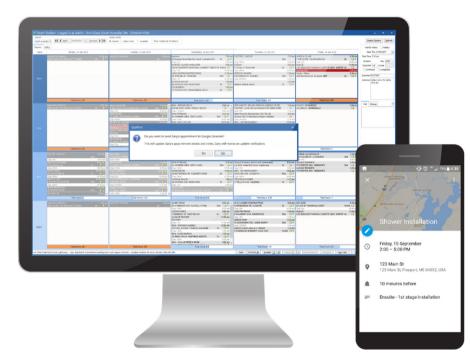
# With fully integrated scheduling, Smart-Toolbox will save your staff time in the office, and in the field.



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

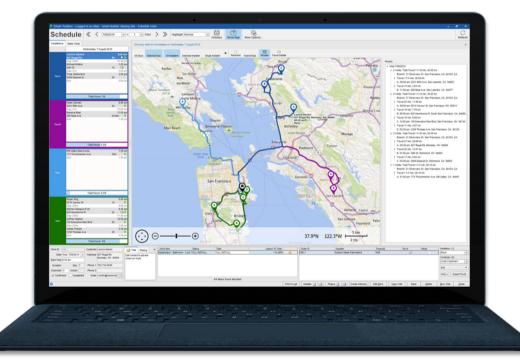
# Make it easy for your whole team to check existing visit details or to book in new ones.



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.

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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.

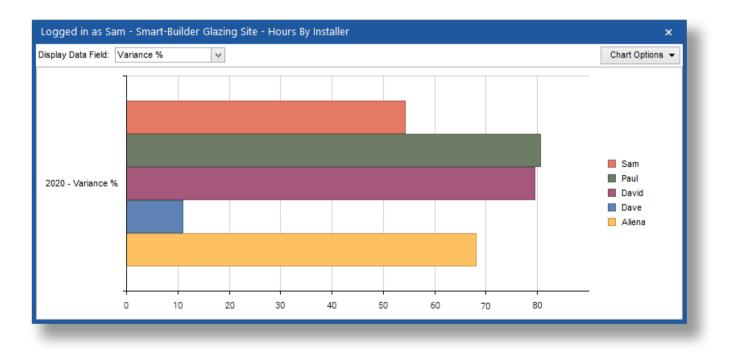
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#### Ready for a demo? <u>Click here</u> enter a few details and we'll show you <u>Smart-Toolbox</u>

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 opportunites 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

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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	Export Required									
Ready to Send	( ) Has Credit Notes									
Sent - Awaiting Payment	C) has credit Notes									
Paid										
Fully Credited										
Bad Debt										
	·									



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

Standard Pricing	Product Pricing Group	Price List	Discou	nt	Further Details
Standard Pricing	Glass Fabrication	Retail		0%	No
01	Glass Products	Retail		0%	No
Glass	Hardware	Retail		0%	No
	Labor	Contractor		0%	No
Processing	Miscellaneous	Retail		0%	No
	Travel	Retail		0%	No
Products					
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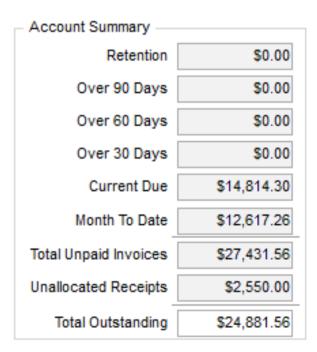
#### Customers Using This Price Book

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.



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 Credit Risk

## **COMPLETE CONTROL**

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

📁 Smart-Toolbox - Logged ir	n as Sam - Smart-Builder Glazing Site	e - Ma	aintain Security Modules		×			
Module	Active Modules Only			Maintain Securit	y Groups			
Module	Default Group For New Users		Groups					
Toolbox Accounts	Minimal Access		Group	Description				
Toolbox Operations	Minimal Access		View Only User	Limited Read Only Access.				
Security	Minimal Access Minimal Access		Basic User Advanced User Privileged Administrator	Create Customers, Quotes and Work Orders. Perform Scheduling and Print Work Orders Due. Create Purchase Orders and Perform Maintenance. Delete Quotes, Work Orders and Purchase Orders.				
			<u>=</u> 5	Clone Group New Group Dele	te Group			
0				Delete Module New Module	<u>C</u> lose			

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.

Filter B	y Date /11/2019	▼ To 29/02/2020 ▼ User	ID Action	<any> V</any>	Screen			<u>R</u> efresh D	Jata
				View			Showing first 500 results	Show A	
Action	User	Date & Time	Screen	Create Modify		ID			-
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Create	Allan	20/11/2019 7:24:18 a.m.	Maintain Shower Styles	View Report		Standard F	Range		
Modify	Allan	20/11/2019 7:25:38 a.m.	Maintain Shower Styles	Print Report		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 Thi	ckness		
Modify	Kenny	17/02/2020 2:16:57 p.m.	External Interface			Quickbook	s Online		
Modify	Kenny	17/02/2020 2:16:24 p.m.	External Interface			Quickbook	s 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		*
2				Save To	Excel	Print	Preview Ba	ack <u>C</u> lo	se

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.



# 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



QUOTE

SCHEDULE

ORDER

INVOICE

REPORT

MANAGE

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