

**Active Leads**

Lead Short Desc.	Account	Amount	Priority	Type	Status	Owner	Hist	Next
BOT - Joe - Remodel - Houston	Bank of Texas	\$350,000.00	Critical	Renovation	Project Approved	Dave		
COD - Bill - Build Out - Dallas	City of Dallas	\$350,000.00	Critical	Build Out	Preparing Submittals	Dave		
FOC - Joe - Build Out - Houston	Full-On Contracting	\$150,000.00	Critical	Build Out	Scorecard Complete	Dave		
ALG - Jim - Remodel - Houston	Alpha Logistics	\$150,000.00	Critical	Restoration	Scorecard Complete	Dave		
MJI - Build Out - Florida	Major Industries	\$350,000.00	Critical	Build Out	Scorecard Complete	Dave		

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**My Tasks**

Done	Subject	Due	Lead	Account	Type	Priority
<input type="checkbox"/>	Post job review with entire team (For Lead: FOC - Joe - Build Out - Houston)	1/4/2020 9:56 AM	FOC - Joe - Build Out - Houston	Full-On Contracting	Job planning	High
<input type="checkbox"/>	Post job review with entire team (For Lead: BTA - Carl - New - Houston)	1/4/2020 9:56 AM	BTA - Carl - New - Houston	BigTech America	Job planning	High
<input type="checkbox"/>	Email notifying customer submittal sent (For Lead: COD - Bill - Build Out - Dallas)	1/8/2020 9:58 AM	COD - Bill - Build Out - Dallas	City of Dallas	Automated Email	Critical
<input type="checkbox"/>	Setup job budget in accounting system (For Lead: MSC - Perry - Renovation - Houston)	1/10/2020 9:57 AM	MSC - Perry - Renovation - Houston	Mason Contractors	Job planning	High
<input type="checkbox"/>	Followup on submittal (For Lead: COD - Bill - Build Out - Dallas)	1/10/2020 9:58 AM	COD - Bill - Build Out - Dallas	City of Dallas	Task-General	High

**My Alerts**

- You have 3 leads without a next step
- There are 47 tasks that are past due

**My Key Statistics**

Active Leads:	26 / \$75,405,443
Conversions YTD:	37 / \$44,544,655 / 67.00%
Conversions Last 12 Mo.:	82 / \$984,877,334 / 58.00%
Sales Backlog-Won (#/\$):	17 / \$120,333,455
Active Leads Avg. Age:	49
New Leads (YTD/12 Months):	23 / 1,023

**Sales Pipeline Analysis**

Chart Settings (click to open)

**Sales Pipeline Status**

- New Bidding Opportunity: 82
- Preparing Bids: 10
- Bid Submitted: 45

**Daily Agenda**

March 29, 2020

- 9:00 AM - Bid Op
- 10:30 AM - Knowles, D
- 12:30 PM - Quote
- 1:00 PM - Custom
- 3:00 PM - RFQ
- 4:30 PM - Houston

**What's New**

What's n

TopBuilder

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2. A cor

About TopBuilder CRM

# The #1 Construction CRM

Providing the industries best pre-construction, sales, and marketing software.

# How we help construction companies.

TopBuilder is the leading provider of pre-construction, sales, and marketing software for contractors of all types and sizes. TopBuilder is the first Construction CRM that helps increase collaboration, communication, efficiency, and profitability throughout your entire sales process. Experience the next breakthrough in construction software.



## Collaboration

Alerts, reminders, calendar appointments, and dashboards organize opportunities, bids, tasks, and jobs for your entire team.



## Organization

You can track all your customer, job, bid, vendor, and contact data in one place where it is accessible from anywhere, anytime, on any device.



## Communication

TopBuilder offers streamlined communication between internal teams, current & potential customers, vendors, crews, and subs.



## Bid Tracking

Track, prioritize, forecast, and manage all your bids under a single job while managing bid due dates and estimator assignments on a bid calendar.



## Forecasting

Forecast, in real-time, revenue and labor requirements for all current and proposed jobs in one place.



## Measure Effectiveness

With TopBuilder, you can track performance by sales team, job type, estimator, lead source, industry, project manager, division, and more.



## Calendar & Email Integration

Connect your work calendar and email, such as Outlook and Gmail, to allow you to see all your bid activity, appointments, jobs, and tasks in one place.



## Industry Integrations

Integrate your Job Cost Accounting, ERP, and Project Management systems to sync customer, job, contact, and financial data with TopBuilder.





## Unique Features

TopBuilder provides a broad set of features unmatched by any other industry solution. This truly makes TopBuilder the #1 Construction CRM.



## Designed for Construction

TopBuilder is built from the ground up for construction with direct input from the industry's most innovative construction companies.



## Quick Implementation

TopBuilder's proven onboarding process gets you up and running quickly. We do the work for you and will train you to make changes yourself.



## Unmatched Support

We provide free weekly training every single week. Additionally, our US based support team provides unlimited email and phone support.



## Continuous Testing

TopBuilder's entire team uses TopBuilder CRM each day. This gives us the unique opportunity to continuously refine our own software system.



## Cloud Based

All of TopBuilder's software is cloud based. This means you can access your information from any web-enabled device.

## How we're different.

We consider ourselves so much more than another technology provider. We're a partner and a collaboration tool, proven to increase your profits, effectiveness, and efficiency.

"TopBuilder is exactly what I need to ensure my marketing investments are not wasted and ensure no sales opportunities are lost. Additionally, we do a more effective job selling while spending a lot less time."



## A few of our top software features.

Our team has built software features specifically for construction companies. The goal is to store all contacts, opportunities, jobs, activities, tasks, and resources all in one location, so you can access information effortlessly.



### Construction CRM

Easily track & manage your bids, collaborate with your team, send customized quotes & proposals, and manage your leads with our Construction CRM.



### Powerful Integrations

Synchronize job, customer, contact, purchase order, vendor, quote items, financial, and operational data with your ERP and project management system.



### Bid Management

By using bid management tools, your sales teams, project managers, and estimators can easily collaborate on all bid opportunities for a single job.



### Bid Prioritization & Scoring

By looking at job history, available labor, manager performance, and payment history, we can tell you which bids you should prioritize for your company.



### Quoting

Build quotes from predefined assemblies, prices, and quantities. Quotes can include Excel, Word, & PDF docs, job photos, addendums, and branding.



### Job Scheduling

With Scheduling Software, you can schedule tasks, appointments, bid due dates, estimators, sub-contractors, project managers, crews, and more.



### Email Marketing

Our email marketing tools help construction companies easily send targeted communications to customers, prospects, and industry contacts.



### Marketing Strategy

Experience an effective approach to building your marketing campaigns, obtaining high-quality leads, and selling more construction projects.



### Analytics

Use dozens of reports to understand your sales and marketing performance, identify areas of improvement, and find hidden opportunities.













### Calendar Integration

Your team will receive automated alerts when they've been added to a job. The job dates will automatically be added to their calendar of choice.

## TopBuilder &amp; Spectrum

# Integration Diagram

 TopBuilder	Real-Time Synchronization		 Spectrum®
Accounts & Contacts			Customers & Contacts
Jobs   Contacts   Financials			Jobs   Contacts   Financials
Job Templates			Jobs   Job Phases
Work Orders			Work Orders
Account Job History & Job Financials			Customer Job History & Job Financials
Account Financials (Credit, Aged Balances, Invoice History)			Customer Financials (Credit, Aged Balances, Invoice History)

## TopBuilder &amp; Spectrum

## How the integration works.

TopBuilder's cloud-based synchronization with Viewpoint Spectrum® makes it easy for management and sales teams to mitigate risks and prioritize profitable bids. In other words, your management and sales teams will see all the job financial information for each client. This tells them if that client has any outstanding jobs, a high outstanding balance, or poor credit. It's everything your team needs to maximize profitability.

# How our end-to-end process works.

## BEGINNING

