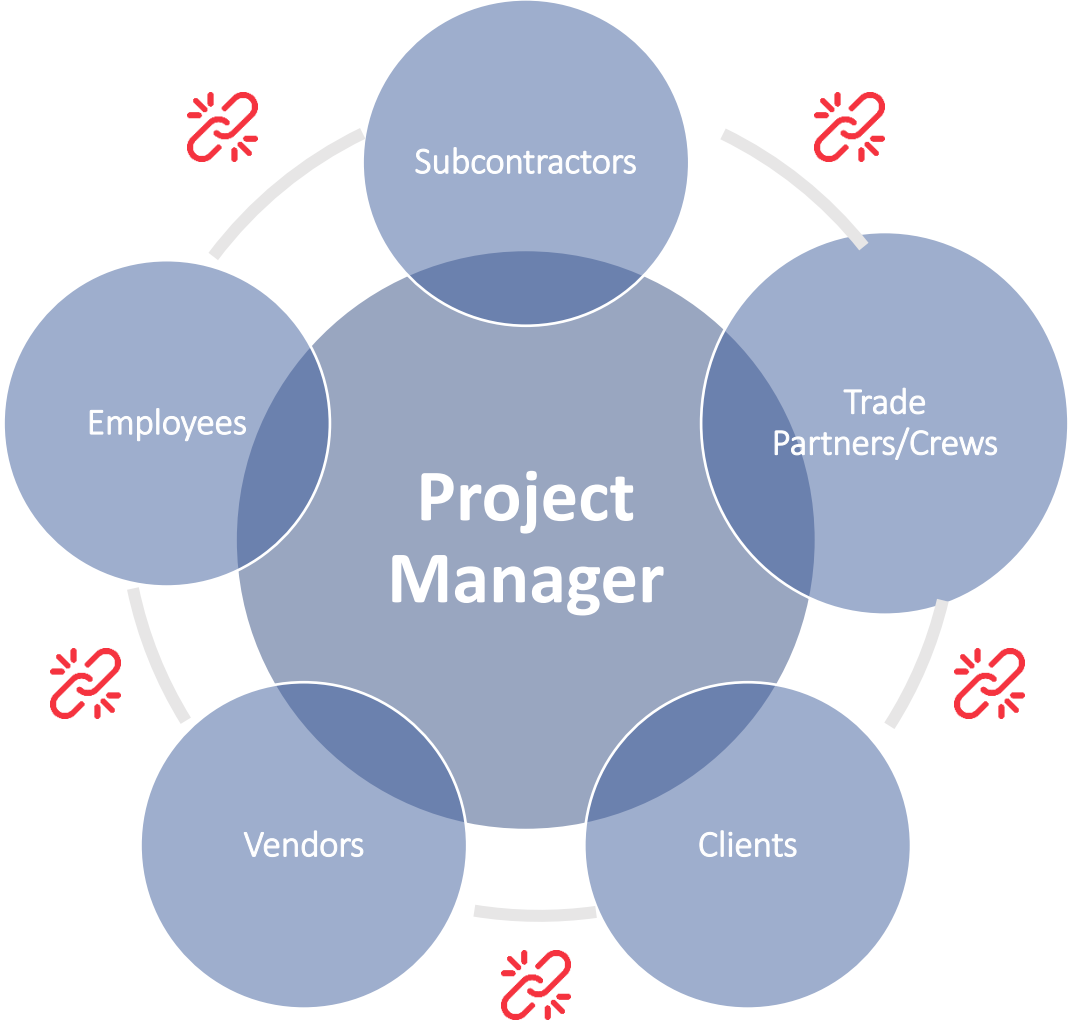


Customer Segmentation



How to Conquer Construction Chaos?



Technology to Eliminate the Chaos



Standardized process

Level up your business



Project budgets

Know where you are with financials



Changes

Stay up-to-date at all times



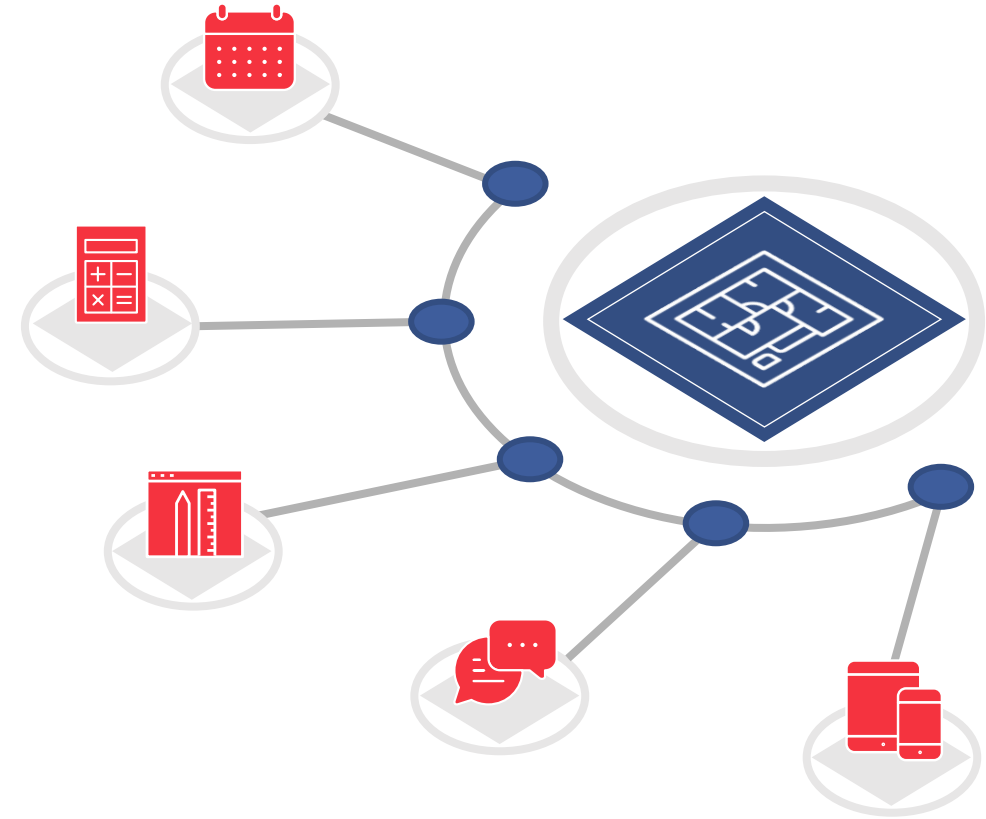
In-platform communication

Centralize your conversations



Client communication

Keep homeowners in the loop



ECI

Industry Focused



LUMBER YARDS
& HARDWARE
(LBMH)



RESIDENTIAL
HOME CONSTRUCTION



FIELD
SERVICE

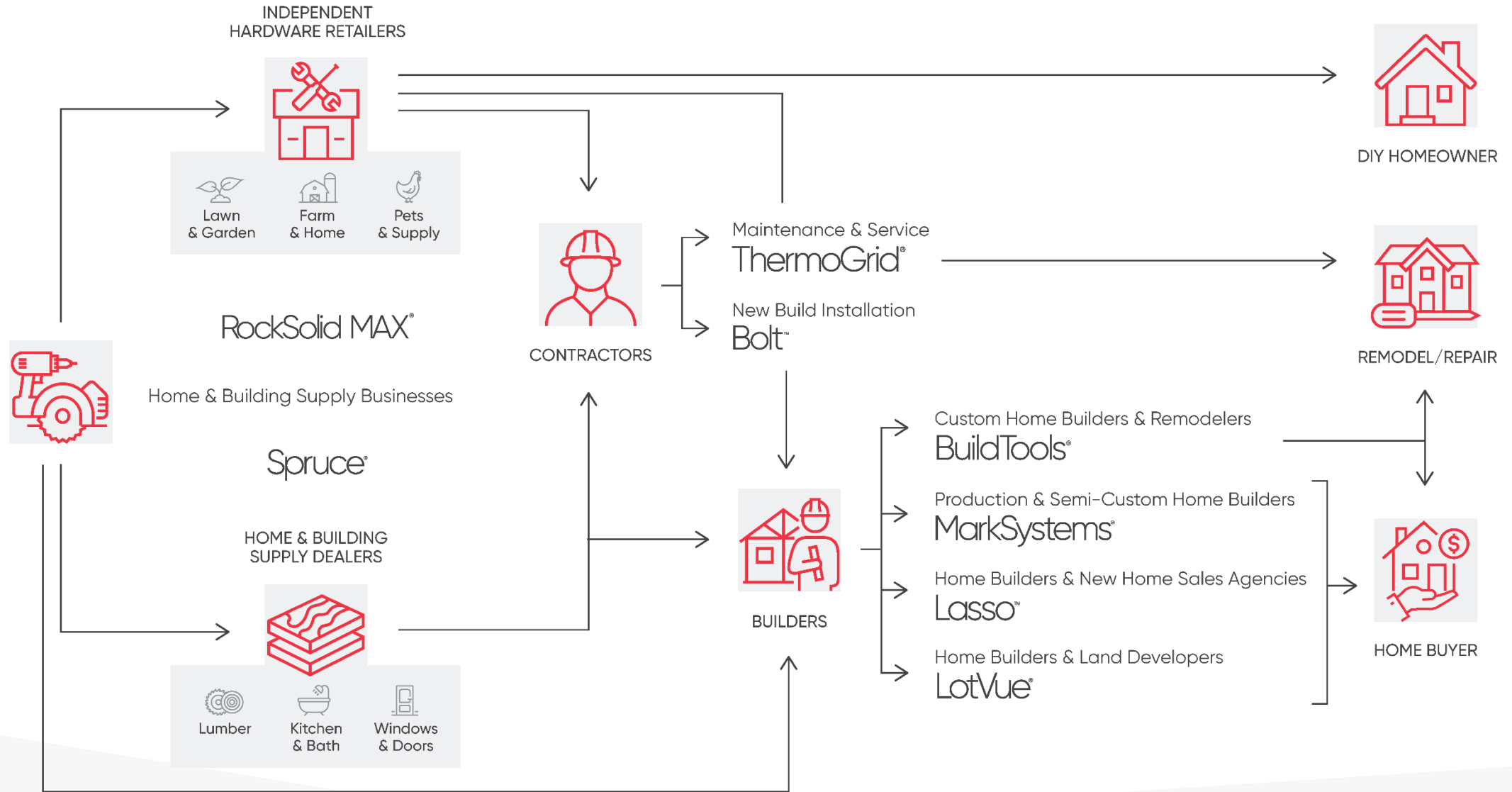


MANUFACTURING



DISTRIBUTION

ECI – Residential Home Construction

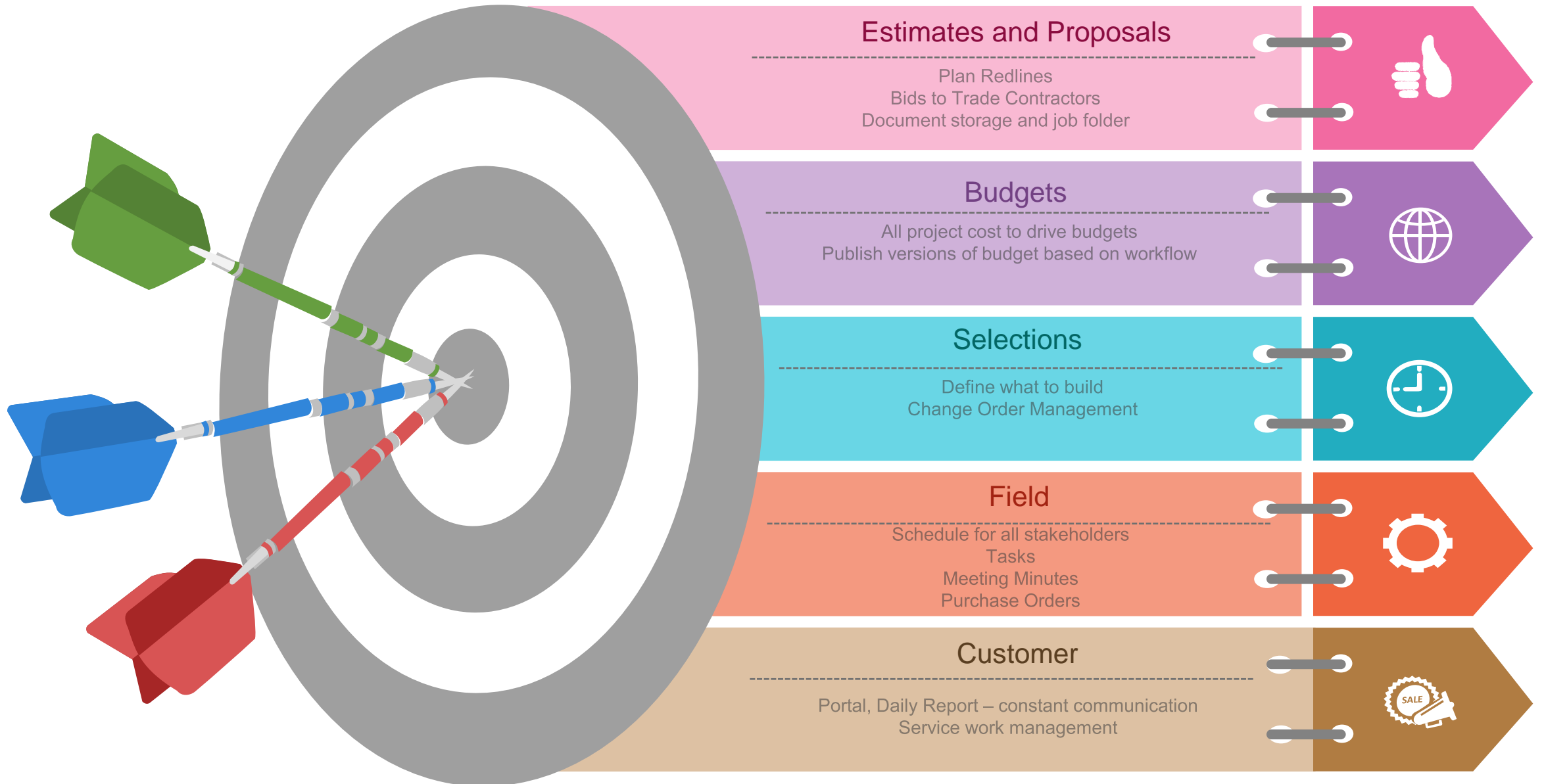


BuildTools

- Custom Builders
- Remodelers
- Specialty Trade Contractors



Using BuildTools Integrated with QuickBooks – Your Business



Proposal

Detrich Custom - Cost Plus Approved View Proposal Save

Details

Title*

Sample Proposal Prop-2

Expiration Date

Description

You can change the view to see only the fields that you want to display on the setup of the estimate. In the next step(Preview & Send) you will format what your proposal looks like before sending to the customer.

Summary

Manage fees

Base Price \$ 730,038.50

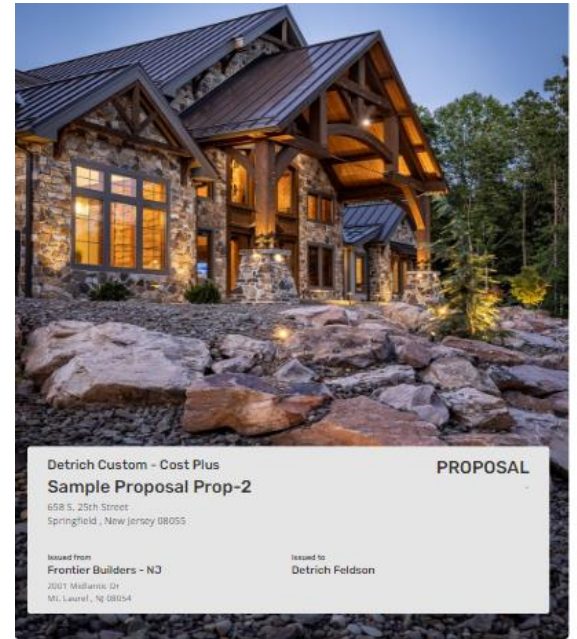
Cost SF \$ 221.22

Fees \$ 280,513.48

Total Price \$ 1,010,551.98

Estimates

										Views				
										Views	Grid	Dropdown	Search	
Details				Price				Fees		Summary				
<input type="checkbox"/>	Budget Category ↑	Location	Description	Notes	Qty	Unit	Unit Cost	Ext. Cost	Cost Type	10010 - Construction Fees %	10010 - C	Total Price	% of Total	Price/SF
<input type="checkbox"/>	1110 - Blueprints	Non-Specified			1	Non-Specified	\$ 350.00	\$ 350.00	Non-Specified	35.00 %		\$ 472.50	0.05 %	\$ 0.10
<input type="checkbox"/>	1120 - Surveys	Non-Specified			1	Non-Specified	\$ 750.00	\$ 750.00	Non-Specified	35.00 %		\$ 1,012.50	0.10 %	\$ 0.22
<input type="checkbox"/>	1210 - Lot Clearing	Non-Specified			1	Non-Specified	\$ 24,500.00	\$ 24,500.00	Non-Specified	35.00 %		\$ 33,075.00	3.27 %	\$ 7.24
<input type="checkbox"/>	1220 - Fill Dirt and Material	Non-Specified			1	Non-Specified	\$ 13,000.00	\$ 13,000.00	Non-Specified	35.00 %		\$ 17,550.00	1.74 %	\$ 3.84
<input type="checkbox"/>	1230 - Rough Grading	Non-Specified			1	Non-Specified	\$ 12,500.00	\$ 12,500.00	Non-Specified	35.00 %		\$ 16,875.00	1.67 %	\$ 3.69
<input type="checkbox"/>	1300 - Demolition	Non-Specified			1	Non-Specified	\$ 13,500.00	\$ 13,500.00	Non-Specified	35.00 %		\$ 18,225.00	1.80 %	\$ 3.99
<input type="checkbox"/>	1430 - Water Service	Non-Specified			1	Non-Specified	\$ 1,250.00	\$ 1,250.00	Non-Specified	35.00 %		\$ 1,687.50	0.17 %	\$ 0.37
<input type="checkbox"/>	1460 - Gas Service	Non-Specified			1	Non-Specified	\$ 1,500.00	\$ 1,500.00	Non-Specified	35.00 %		\$ 2,025.00	0.20 %	\$ 0.44
<input type="checkbox"/>	2100 - Footings and Foundation	Non-Specified			1	Non-Specified	\$ 28,900.00	\$ 28,900.00	Non-Specified	35.00 %		\$ 39,015.00	3.86 %	\$ 8.54



HOME IMPROVEMENT PROPOSAL AND COST PLUS CONTRACT

Detrich Custom - Cost Plus
Sample Proposal Prop-2
 658 S. 25th Street
 Springfield, New Jersey 08055

PROPOSAL

Issued from
Frontier Builders - NJ
 2001 Millbank Dr
 Mt. Laurel, NJ 08054

Issued to
Detrich Feldson

1. AGREEMENT:
 This agreement made this 25th day of February, by and between Frontier Builders hereinafter called the Contractor and Detrich, hereinafter called the Owner.

2. SCOPE OF WORK:
 The work to be done consists of furnishing all labor, tools, equipment, and materials all other necessary equipment and supplies to perform a complete and thorough job for the complete remodel and room addition per City of Indian Wells approved plans once we receive them. Including all home construction, pool construction, landscaping and perimeter walls.

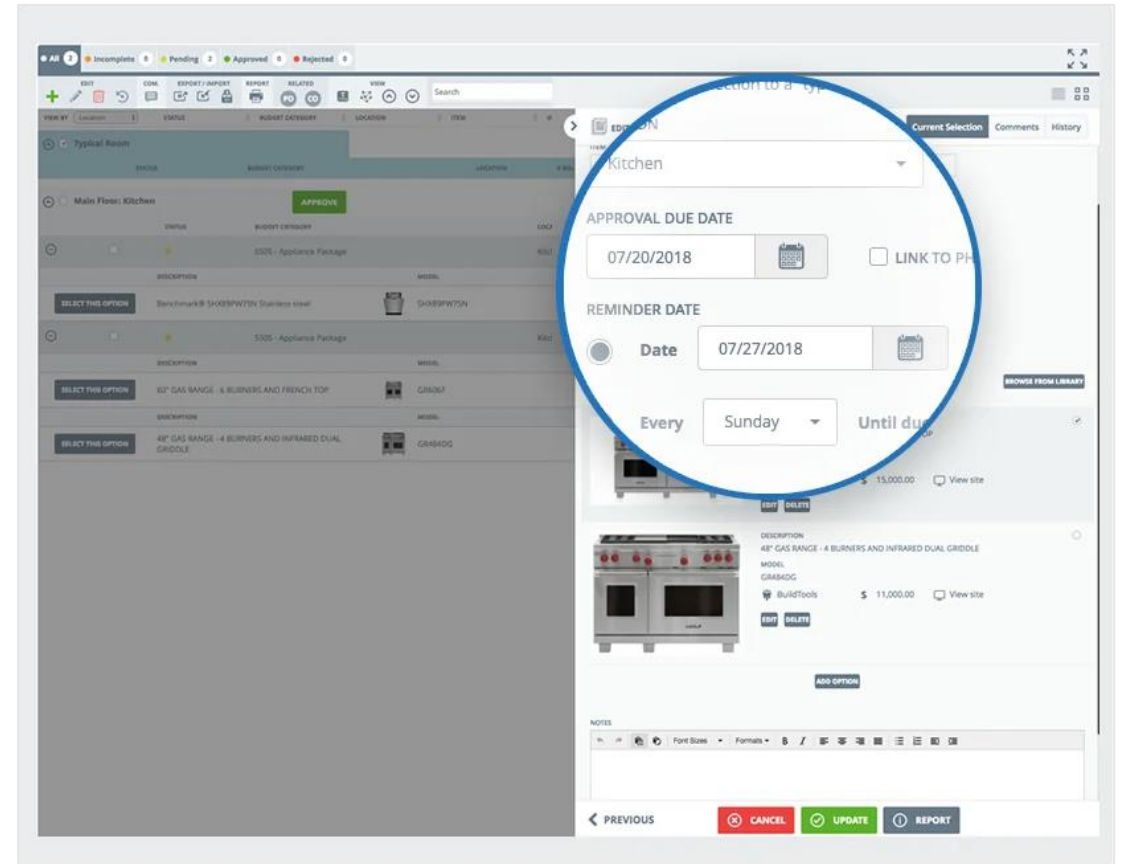
Job Info
Homeowner: Detrich
Address: 127 Sitting Bull Trl, Medford Lakes, NJ 08055

3. COST PLUS CONTRACT PRICE:
 The Contractor shall perform and complete the above work on a cost plus basis. Contract will be based on a cost plus 15% basis for all subcontractors, including Supervision \$ 1,000 per week and pre-construction cost. Supervision based on 9 months estimated job time \$36,000.

Hourly rates for all additional work as follows:

Selections and Change Orders

- Create a selections library to eliminate reentering common selections
- Keep selections organized by location of build or category for easy access
- Enable clients to electronically sign off on selections or change orders
- Automatic budget updates based on change orders
- Create associated POs so vendor costs don't fall through the cracks



Weekly Report

- Keep your clients in the loop
- Weekly report is polished and professional
- Hyperlink to new/updated change orders that clients can review and approve
- Include progress photos
- High communication touch point that eliminates the common back and forth


The screenshot displays a 'Weekly Report' interface for a project named 'Johnson Residence'. The report is organized into several sections:


- WEEKLY REPORT**: The main title of the report.
- PROJECTS DETAILS**: Lists the project name, 'Johnson Residence'.
- A NOTE FROM YOUR PROJECT**: A section for project notes.
- THIS WEEK:** Contains the text: 'Baseline schedule will be finalized 7/3/2020.'
- LAST WEEK:** Contains the text: 'Final budget has been completed.'
- UPCOMING WEEK:** Contains the text: 'Will be planning to kick off the Project.'
- SCHEDULE**: A section for project scheduling.
- PROJECT COMPLETED PERCENTAGE**: Shows a progress bar at 94.98%.
- LAST WEEK WEATHER**: Indicates 'THURSDAY' with a sun icon and weather details: 'Humid and partly cloudy throughout the day. Hi: 80, Lo: 52'.
- CALENDAR**: Shows the date 'Thursday, September 26th' and participants: 'Jonny Winge, Jonny Winge, Jonny Winge'.
- LATEST DOCUMENTS**: A list of documents including 'Comments Notification.png', 'Sub Dashboard.png', 'Sub PO Email Notification.png', 'Sub PO Confirmation.png', and 'List Schedule Report.pdf', each with an upload timestamp.
- LATEST PICTURES**: A gallery of five construction photos showing the progress of the building.
- NEW / UPDATED CHANGE ORDERS**: A table listing change orders with their amounts.

NEW / UPDATED CHANGE ORDERS	
Approved Change Orders	
Additional Demo Expenses	\$ 0.00
Drywall Extras Budget Reallocation	\$ 0.00

Scan with your phone

Keeping all Stakeholders Informed


Detrich Custom - Cost Plus
658 S. 25th Street
Springfield, NJ 08055




SCAN QR CODE

with your phone's camera to access
Project information Or visit:
<http://tinyurl.com/ykkct3gt>


Note: SUBS: Please use this QR code daily, to obtain
and share info on the project

BUILDER
Frontier Builders - ECI
127 Sitting Bull Trl
Medford Lakes, NJ 08055

PROJECT MANAGER
Bob Weirs
C: Ph: (609) 555-6682

Patented technologies by  **BuildTools**

11:59
camera

 **ECI Build Tools**





Detrich Custom - Cost Plus
658 S. 25th Street
New Jersey 08055

Note: Scroll down for access to
calendar and communication tools

Documents

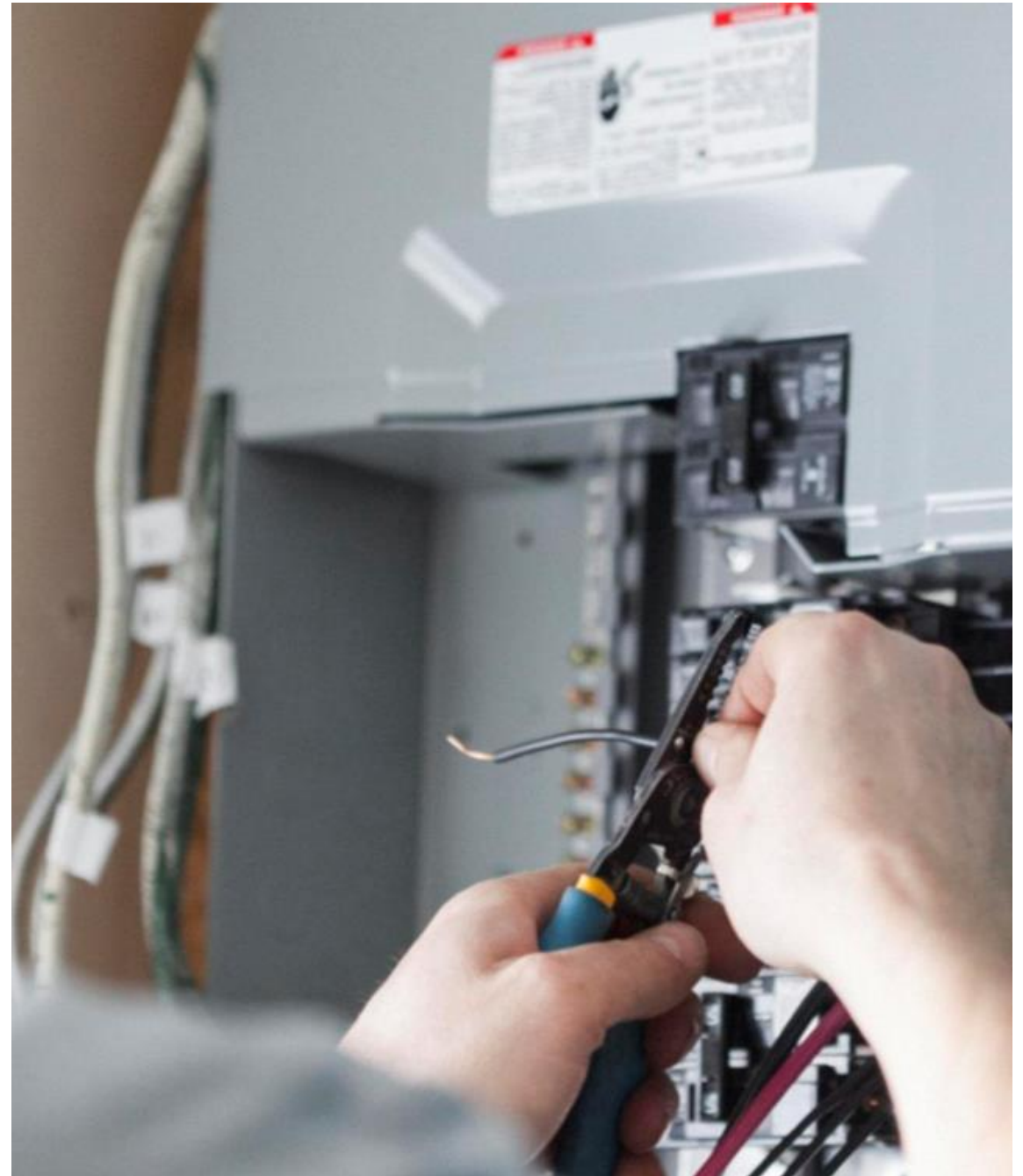
Drawings ▾

- Building Section Drawing Jan 18, 2023
- Detail Drawing Jan 18, 2023
- Kitchen Cabinet Drawings Jan 18, 2023
- Main Floor Plan Drawing Jan 18, 2023

 View Schedule |  Contact PM |  Report Issue |  Upload Document

Bolt

Trade Contractors who work for builders



Important software capabilities for trade contractors

✓ Scheduling

Create and manage [project schedules](#) from a centralized platform to ensure all team members can access the most up-to-date schedule.

✓ Job Management

Streamline and optimize [job management](#) processes to effectively manage their projects, tasks, resources, and client relationships.

✓ Mobility

Gain real-time access to job details, and other important documents directly from your [mobile devices](#) whether on or off the job site.

✓ Project Management

[Manage all aspects](#) of your job. Define tasks, allocate resources, and establish timelines to ensure tasks are completed on time.

✓ Estimating

Accurately [estimate the costs](#) of your projects, create detailed bids, and allocate resources to effectively manage your jobs.

✓ Communications

Enable real-time information sharing and streamlined collaboration for efficient and effective [communication](#) with all parties.

✓ Document Management

Streamline handling, organization, and collaboration of documents to reduce errors and improve [documentation](#) processes.

✓ Reporting

Generate accurate and comprehensive [reports](#) to gain insights into job performance to make informed decisions on your business.

✓ Quality Control

Maintain and enhance the quality of your work, ensure compliance with industry standards, and improve [customer satisfaction](#).

Welcome to Bolt Software Technology

Timecard

0:00:00

Work

Driving

Notes

Reports [Edit Security Levels](#)

Productivity

- Faults
- Completion
- Warranties
- Trips

Crews

- Payroll
- Contract Labor
- Timesheet
- Crew Pay
- Payroll Summary

Schedule

- Crews
- Supervisors
- Forecast
- Homeowners
- Status

Analytics

- Insights

Top ranked

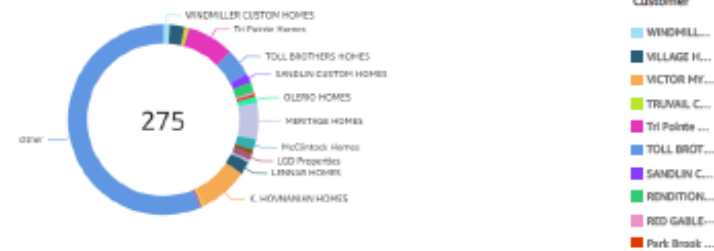
- Top 3 customer for total count of records are:
- BLOOMFIELD HOMES with 100
 - HISTORY MAKER HOMES with 58
 - DAVID WEEKLEY with 45

Starts Today



Starts this Month

SHOWS TOP 20 BY CUSTOMER

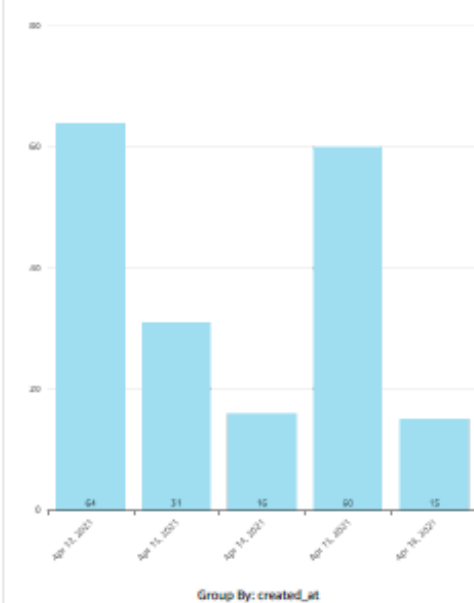


Starts this Month by Supervisor

SHOWS TOP 10 BY CUSTOMER AND TOP 10 BY SUPERVISOR



Previous Week

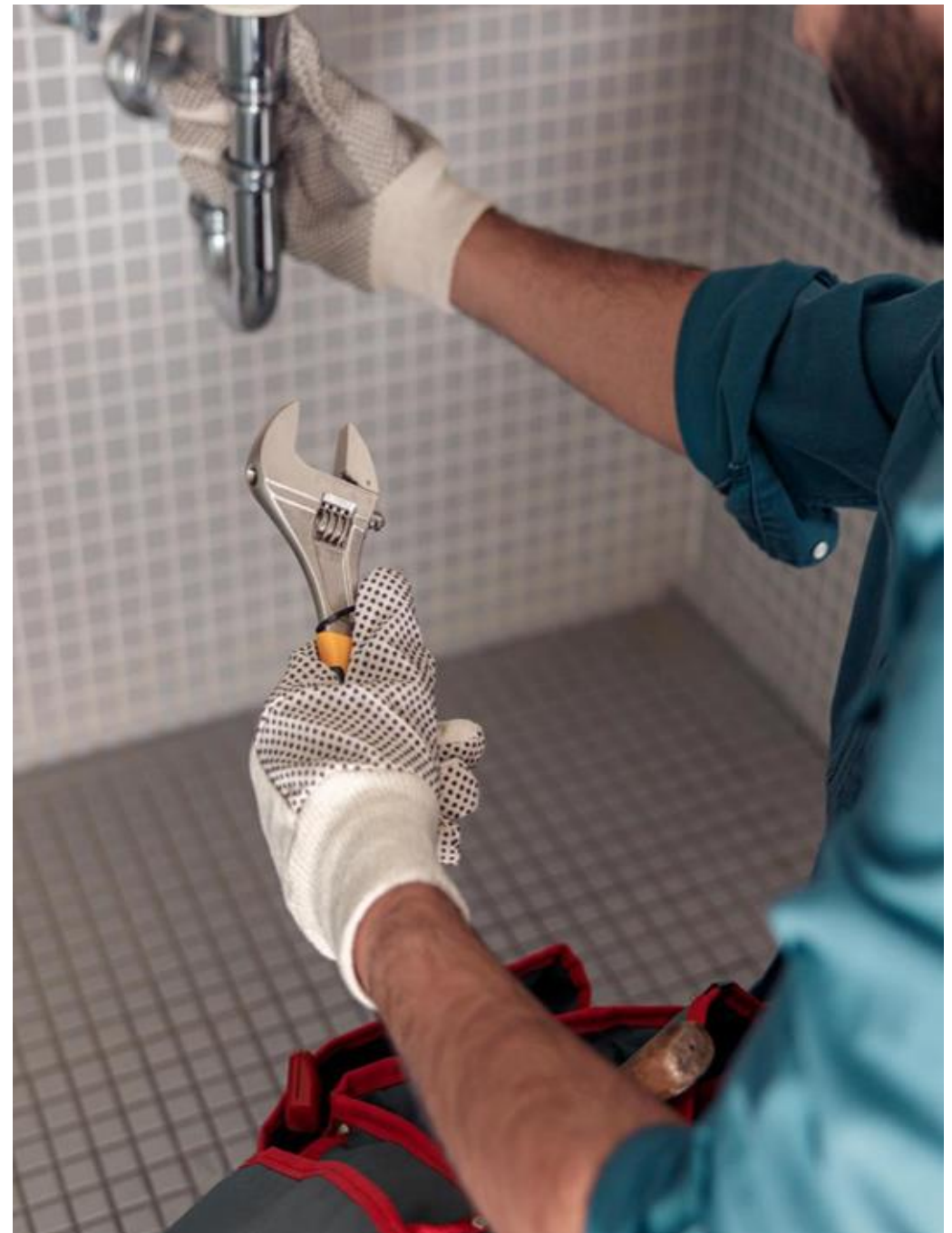


Current Month Previous Year

customer	community	Count
1ST TEXAS REM...		6
A-1 LIGHTFOOT ...		18
AAA TEXAS		12
Abdul Quayyum		1
ABSOLUTE CON...		1
ACE DFW CONST...		2
ADOLPHUS HO...		16
Adooring Designs		1
ADVANCED FOU...		284
AJ RUSSELL		1
ALAN		1
ALAN MORRIS		1
ALAN WORTHIN...		1
Al Couto Homes ...		18
ALEXANDER HU...		17
All G Construction		3
ALLIANCE HOMES		2
Alphavetta Custo...		3
AMERICAN LEGE...		4,654
AMERICAN LIFE ...		155
AMERICAN LIFE/...		2
ANDERSON HO...		1
ANDREW MICA C...		1
Angeline Galdo ...		1

ThermoGrid

- Mechanical Trade Contractors who provide homeowner services



Owners and General Managers

INCREASE BUSINESS PRODUCTIVITY

Bookkeepers

ACCESS ACCURATE DATA

Office Managers

STREAMLINE OPERATIONS

Dispatchers

RIGHT TECH, RIGHT CALL

ThermoGrid Features

- Job Estimates vs. Actuals
- Hours clocked
- Commissions against job(s)
- Equipment
- Materials & Labor
- Fees & Taxes
- Orders synced to COA



One Convenient Platform

Secure centralized access to your payments, scheduling, dispatching and more



NEW Custom Workflows

Create your own custom processes



Built for Techs

HVAC technician-friendly application



Mobile Access

Access from any location and device with both offline and online mode



SMART Dispatching

Tech dispatch based on role, skill, location, and performance



Business Owner Reporting

Insight into invoicing, timesheets, dispatching, and more to improve overall productivity



Inventory Management

Efficiently oversee the acquisition, storage, and utilization of goods and materials within your organization for timely product availability.



Estimates, Quotes, & Service Agreements

Our system simplifies the entire process, from estimates to long-term service agreements, to help you build trust with clients.



Store Photos and Docs in One Spot

Keep your documents stored in one place, under one project. View and upload all job-related files anywhere, anytime.

Reports

Daily Management Dashboard

Team KPIs

Payroll Reports

Unit Age and High-Cost Unit Reports

CardConnect

Authorization: Capture:

Charge:

Refine Orders

Use Date: Order Number:

Option:

Refine Memberships

Use Date: Membership Plan:

Option:

[Apply Filters](#) [Reset Filters](#)

Date	Reference	Amount	Option	Type	Client	Status	Charge
2021/02/10	Platinum Club (10/07/2020 - 10/07/2021)	\$15.00	Recurring Payment	Credit Card	J Rodgers Aaron's Pizza Palace	Approved	\$15.00
2021/02/10	Gold+ (27/07/2020 - 27/07/2021)	\$20.47	Recurring Payment	Credit Card	J Rodgers Aaron's	Approved	\$20.47
2021/02/05	The Membership (24/06/2020 - 24/06/2021)	\$15.95	Recurring Payment	Credit Card	J Rodg Aaron's		
2021/02/01	Auto Renew Membership (01/09/2020 - 01/09/2021)	\$5.00	Recurring Payment	Credit Card	J Rodg Aaron's		
2021/02/01	Monthly (21/07/2020 - 21/07/2021)	\$19.99	Recurring Payment	Credit Card	J Rodg Aaron's		
2021/02/01	Pool Water Treatment Maint (07/07/2020 - 07/07/2021)	\$19.95	Recurring Payment	Credit Card	J Rodg Aaron's		
2021/02/01	Monthly (15/12/2020 - 15/12/2021)	\$16.50	Recurring Payment	Credit Card	James		
2021/02/01	Gold Plan Plus (21/05/2020 - 21/05/2021)	\$15.95	Recurring Payment	Credit Card	J Rodg Aaron's		
2021/01/27	Monthly (27/07/2020 - 27/07/2021)	\$32.35	Recurring Payment	Credit Card	J Rodg Aaron's		
2021/01/16	Gold Plus Membership (16/06/2020 - 16/06/2021)	\$10.00	Recurring Payment	Credit Card	Brett Fa		
2021/01/16	Gold Plus Membership (16/07/2020 - 16/07/2021)	\$10.00	Recurring Payment	Credit Card	J Rodg Aaron's		

Reports

Start Date: End Date: Date Type: Created By:

Royalty Scale:

[Run Report](#) [Export to Excel](#)

Order	Status	Create Date/Time	Costed Date/Time	Customer	Revenue	Statistics	Payment Status
202012291449014	Submitted	2020-12-29 02:46pm	01/05/2021 5:53pm	Tommy Tompson 201 S. Main St Galena IL	\$20,109.98	Commission: \$402.20 2.00% Labor: \$202.00 1.00% Equipment: \$3,314.24 16.48% Separated Tax: \$0.00 Gross Margin: \$13,855.50 68.90% Material: \$2,336.04 11.62% Total Cost: \$5,852.28	Not Paid
2020121015540219	Submitted	2020-12-10 02:54pm	--	Bonnie test 12356 street road IA	\$6,087.76	Commission: \$116.97 1.93% Labor: \$270.99 4.45% Equipment: \$643.24 10.57% Separated Tax: \$0.00 Gross Margin: \$4,278.23 70.28% Material: \$778.33 12.79% Total Cost: \$1,892.56	Not Paid
2020093010395747	Submitted	2020-09-30 10:39am	--	Adam Cory 16797 Daisy Trail Dubuque IA 52001	\$9,443.03	Commission: \$184.07 1.95% Labor: \$280.99 2.98% Equipment: \$1,983.23 21.00% Separated Tax: \$0.00 Gross Margin: \$6,250.77 66.19% Material: \$743.97 7.88% Total Cost: \$3,008.19	Not Paid
2020080810123711	Submitted	2020-08-08 10:12am	10/02/2020 11:04am	Adam Cory 5455 Dorchester Ln dubuque IA 52003	\$9,206.22	Commission: \$179.38 1.95% Labor: \$270.99 2.94% Equipment: \$1,069.78 11.62% Separated Tax: \$0.00 Gross Margin: \$6,965.07 75.64% Material: \$723.00 7.85% Total Cost: \$2,663.77	Not Paid
2020081511048688	Submitted	2020-08-15 11:04am	01/08/2021 3:16pm	Jim Runde 3477 Hillcrest Rd Dubuque IA 52002	\$10,517.00	Commission: \$924.98 8.80% Labor: \$270.99 2.52% Equipment: \$2,100.00 19.97% Separated Tax: \$0.00 Gross Margin: \$6,820.84 64.86% Material: \$406.19 3.86% Total Cost: \$3,490.81	Not Paid
2020071416185564	Submitted	2020-07-14 04:18pm	01/08/2021 1:14pm	James Blonde 210 Hill St Unit 10 East Dubuque IL 61025	\$130.00	Commission: \$0.00 0.00% Labor: \$15.00 11.54% Equipment: \$0.00 0.00% Separated Tax: \$0.00 Gross Margin: \$110.10 84.69% Material: \$1.00 0.77% Total Cost: \$19.90	Not Paid

Statistics			
Commission:	\$1,807.60	3.26%	Gross Margin: \$38,280.51 68.98%
Labor:	\$1,304.96	2.35%	Material: \$4,988.53 8.99%
Equipment:	\$9,110.49	16.42%	Total Cost: \$16,127.31

Revenue Totals	
Total Not Paid	\$55,495.99
Total Billed	\$0.00
Total Paid	\$0.00

Summary | Sales | Service | Installations | Call Center

Monthly Budget:

Work days: [Show 20 Work Days](#)

Revenue by department: Sales (\$231.65), Service (\$4972.91), Installations (\$0.00), Call Center (\$0.00)

Total Revenue: Current Revenue: \$143,811.04, Revenue Goal: \$222,000.00

Sales Conversion Percentage: 82%

	Budget	Actual	Run Rate	Goal	Daily Needed	Daily Available
Totals:	\$222,000.00	\$143,811.04	\$221,247.75	-\$752.25	\$11,169.85	
Sales Revenue	\$177,600.00	\$224,666.00	\$345,640.00	\$168,040.00	\$0.00	
Sales Calls	60	28	43	-17	4.57	0
Service Revenue	\$44,400.00	\$39,380.00	\$60,584.62	\$16,184.62	\$717.14	
Service Calls	247	169	260	13	11.14	0
Installations Revenue	\$177,600.00	\$104,431.04	\$160,663.14	-\$16,936.86	\$10,452.71	
Installations Calls	33	21	32	-1	1.71	0

Which solution is best for you?

	Bolt for Trade Contractors	ThermoGrid for Service Contractors
Do you primarily work with builders on new residential construction projects?	✓	✗
Do you need to create a contract to track extra POs that can then be sent to a home builder?	✓	✗
Do you need to manage a constantly changing schedule with a home builder?	✓	✗
Do you primarily perform service and installation for residential or commercial customers?	✗	✓
Do you need to schedule and dispatch field technicians to jobs?	✗	✓
Do you directly invoice homeowners for completed jobs?	✗	✓



- All things required to sync invoices
- Invoice/bill payments
- Expenses
- Purchase Orders



- All things required to sync invoices
- List of completed work orders synced to QB Invoices



- Orders synced to COA
- Inventory
- Financials

The ROI of Better Communication



Better communication, happier clients, more business



Eliminate grey areas and uncertainty



Avoid surprises



Build Trust



Thank You

Bob Cain

rcain@ecisolutions.com

<https://www.ecisolutions.com>