

# CRM & Sales Tools





## Streamline Your Sales Systems.

Manage leads, monitor your sales pipeline, and onboard customers with flexible Lead Tracking from ConstructionOnline.

### Get a clear picture of your sales progress with a customizable Lead Pipeline.

ConstructionOnline gives you the flexibility to track leads your way with the fully-customizable Lead Pipeline. You can choose the lead stages, sources and types that fit your workflow. The total value per stage is always visible, so you can see exactly where in the pipeline potential revenue is positioned.

### Find the leads you're looking for quickly with detailed filters.

There's no need to spend hours searching for a group of leads matching a specific set of criteria. ConstructionOnline offers powerful, compound filters that allow you to show matches for lead stage, status, source, quality, assigned sales rep and much more.

### Stay on top of meetings and callbacks with the Lead Calendar.

Ensure no important meetings or deadlines are missed with the powerful Lead Calendar. Create calendar events for any type of lead activity, from callbacks to site visits. Set reminders and attach documents for your sales reps and related leads so everyone involved stays up-to-date with every step of the sales process.

### See a detailed, real-time feed of lead activity with TimeLine Views.

Get the full picture of your leads' past and future activity with TimeLine Activity views, only in ConstructionOnline. You'll see a chronological history of meetings, outreach, status changes and more, giving you the context you need to more effectively convert leads to clients.



## Make Better Decisions, **Close More Deals.**

Organize and prioritize your future jobs with accurate estimating, takeoff integration, selections, reporting and more.

### **See exactly where your conversions stand with adjustable opportunity stages.**

Get the flexibility to track opportunities the way that works for your business. Define your pipeline stages and see the number of potential jobs at each one, so you can make more informed decisions going forward.

### **Generate estimates directly from your plans with integrated Redline Takeoff.**

Only ConstructionOnline offers full takeoff integration for opportunity estimate creation. Redline Takeoff is purpose-built to give you the power to generate detailed estimates directly from your plan sets, so no material or labor costs go unnoticed.

### **Ensure your bids are on target with the most powerful online estimating.**

ConstructionOnline features OnCost™ Estimating, the most powerful cloud-based estimating available designed for construction. Generate accurate estimates and get the confidence that you're not over- or under-bidding jobs.

### **Impress leads and win more jobs with professional proposals and reports.**

Get a leg up on the competition by impressing potential clients with professional proposals, created directly from your estimates and branded with your company's logo.





## Stay On Top of Your Prospects.

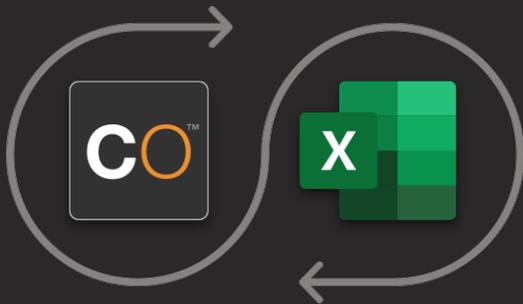
Give your sales reps the tools they need to stay up-to-date on future lead events and document the details.

### Create and track quality communication with the Lead Calendar and Events.

Turn callbacks into conversions with the powerful Lead Calendar. Follow-up with your leads in a thoughtful, organized manner with scheduled Lead Events, and ensure your sales reps are aware and prepared with detailed event reminders.

### Add context to your calls with easy-to-use Call Logs.

Instantly log any incoming or outgoing calls with your Leads. Add clarity to Call Logs by entering notes or attaching supporting documentation. All logs can be filtered by lead and sales rep for easy reference.



### Seamless Integration.

ConstructionOnline Lead Tracking is designed to get your existing leads into ConstructionOnline in a snap with easy Microsoft Excel imports. Need to share your lead list with someone? That's no problem either, thanks to powerful Excel exports.



## Turn Information Into Insight.

Know the true position of your sales financials with comprehensive Lead and Opportunity value reports.

### See the big picture with with Lead and Opportunity Overview Reports.

Create overview reports for Leads and Opportunities, filtered by status, stage, sales rep, date range and more. Get insight on potential future revenues and make more informed decisions on which projects to pursue.

### Drill down for more detail with Lead and Opportunity Value Reports.

See the total and average value of your Leads and Opportunities by source and sales rep, giving you better visibility on which areas and employees are performing well and increasing your revenues.

# Past & Future Activity - All in One Place.

Every lead in ConstructionOnline features the revolutionary new TimeLine - a comprehensive, centralized interface designed for intuitive lead tracking.

## See your leads' history, documents, upcoming events and more with TimeLines.

TimeLines give you the power to store and manage all critical communication, documentation and events for your leads. You can see a full history of each lead's interactions with your sales reps, any attached files, related opportunities and much more.

## Quickly view and adjust Lead Details, including status, quality, stage and more.

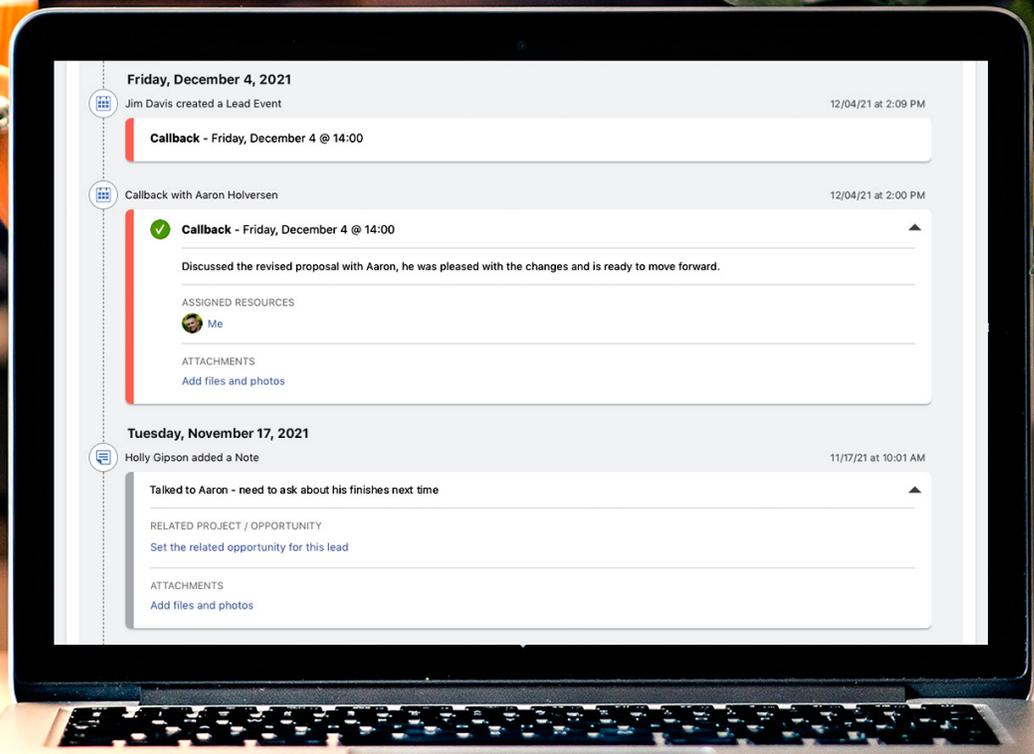
Every lead's details are prominently displayed in the TimeLine interface for easy reference and adjustment. You can change a lead's value, quality, sales rep and more without opening a separate window.

## Centralize lead communication with messaging and call logs.

Tired of searching through emails and text messages for your lead correspondence? The lead TimeLine gives you a centralized repository for all communication, so nothing falls through the cracks.

## Create notes, events, attachments and more with quick action buttons.

The TimeLine view is designed to save time and frustration by making it easy to add notes, create lead events, send messages, upload attachments and more, all with the click of a button - and all in one place.



# Keep Clients **Connected.**

Clients stay in the loop and informed of the latest project activity and progress with easy-to-use ClientLink Logins.

## Clients stay up-to-date and informed with ClientLink Logins.

Satisfy your clients' curiosity about the status of their jobs by giving them an easy portal to view upcoming events, due dates, photos and more. Make sure jobs stay on track by giving clients the ability to view and approve selection choices and change orders, so you can arrange for the necessary materials and labor.

## Keep the conversation going with messaging and announcements.

Stay in touch with clients throughout the building process with organized, project-based messaging tools. Update everyone involved of any critical job information or status changes with announcements.

## Control what clients can and can't see with detailed permission settings.

Make certain that clients only see what you want them to with granular permission settings. You can choose to show what documents and images they can view, how much financial information is visible, and what task details are available to review.

## Avoid delays and miscommunication with Selections and Change Orders.

Minimize potential delays related to missed due dates and postponed material orders for selection choices. Make sure clients are aware of potential cost increases and delays due to change orders, and protect yourself from future liability.



We help more than 750,000 pros worldwide surpass their limits everyday.



### Try it for yourself, risk-free

Try ConstructionOnline for yourself with a 10-day free trial, featuring full access to our award-winning suite of management tools.

[Get Your Free Trial](#)



### Get a personalized demo

Let one of our product experts show you how ConstructionOnline can help you increase efficiency, reduce errors, and build smarter.

[Schedule Your Demo](#)



### See the latest & greatest

Just like you, we love to build. We're constantly innovating to meet and exceed our clients' needs - click below to see what we've been up to.

[See the Latest News](#)

*"The absolute best construction management program, paired with phenomenal customer service."*

Sebastian Ferdinand, Veritas Contracting Group