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Toolbox Software — Toolbox

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From the April/May 2007 [Review of Construction Accounting Software](#)

Toolbox Software has been offering software to construction and construction-related companies for over 10 years. Originally designed by a construction-specific CPA firm, Toolbox offers a non-modular approach, which is most suitable for mid-sized companies. Real-time transaction processing, easy flexibility and numerous customizing options are found throughout Toolbox, including multi-company processing, where users can choose to utilize the same database or create a new one. The program offers easy tracking of liens and release notices, allows users to enter and maintain a history of change orders, provides for the tracking of completion percentages and permits unlimited phase and cost code levels. An unlimited number of user-defined cost types can be set up for new jobs, and indirect job costs can be allocated at any time, even retroactively.

All fixed asset information can be tracked, including cost attached per job. Depreciation data can be maintained for every piece of equipment owned, and recording serial numbers within the program will help to protect against loss. Revenues can be tracked using a variety of criteria, including by salesperson, by region, by project manager or by estimator. An unlimited number of costs can be attached to inventory and non-inventory items. Drilldown capability is provided in most reports in the system, covering all modules. Dashboard drilldown capability is provided in the Job Cost and GL modules. As well, reporting options have been enhanced with upgraded financial reporting capability.

The Toolbox job entry screen is comprehensive, with tabs for entering job description, scales, job budget, scheduled value, cost plus, status, purchase order and subcontractor information, liens, an area to attach files, and notes. Tabs can be customized or eliminated as needed. The Plant module offers unlimited material cost and billing rate scales. Work orders can be assigned to a specific technician and tracked by status or type. Documents can be e-mailed, faxed or saved in PDF format from most screens.

Toolbox has introduced a number of new enhancements with the latest version, including the addition of a series of .NET grids that provide users with exceptional customization abilities for improved workflow. This version also introduces Scheduling, multi-location inventory management, and improved database synchronization. The vendor also noted that it will soon add the ability to drilldown to source transactions and provide automatic updates and expanded Help screens, among other things.

LEARNING CURVE – 4.5 Stars

Toolbox provided a Demo CD, a new version update and detailed instructions, which translated to a painless installation and setup. ODBC compliance makes Toolbox extremely user friendly and allows users to customize the invoice, payroll, purchase order and subcontract entry screens.

The main screen of Toolbox features a drop-down menu bar that provides access to all system features. At the left-hand side of the screen is a vertical bar containing icons that offer one-click access to frequently used functions. Navigation through Toolbox is easy, with data-entry screens laid out in a logical sequence. Users can change the order in which fields appear in the data-entry screens to accommodate the user's preference and allow for smoother data entry. All data-entry screens also contain drop-down lists for easy item lookup. The Help function offers limited assistance, but a user manual is available to assist new users with questions. A series of tabs is available in both the AP and AR data-entry screens that provide access to previously entered transactions such as AP invoices and customer billings. Tabs that are not utilized can be eliminated if desired. Additional system preferences can also be set up using the Utilities function.

MODULES & ADD-ONS – 4.5 Stars

Toolbox includes GL, AP, AR, Job Cost, Payroll, Document Control, Scheduling, Inventory, Plant, Fixed Assets and Estimating. Using a relational database eliminates

the need to purchase only certain modules and allows users to have access to the complete Toolbox program upon purchase.

PRODUCTIVITY TOOLS – 4.5 Stars

Toolbox offers numerous productivity tools, including the GL Miscellaneous Names feature, which allows users to record additional contact information when processing cash purchases. A list of active customers can be maintained via the AR function, placing historical customers on the inactive list rather than eliminating them from the database. As well, the Job Cost module offers Estimating System Templates that work with third-party applications. Also of note, is the Implementation feature, which assists with all aspects of system implementation, from understanding construction accounting to customizing screen layouts and cost code libraries.

IMPORT/EXPORT & INTEGRATION – 5 Stars

Toolbox is a completely integrated system that eliminates time-consuming batch processing by using one central database for easy data access. The program is ODBC-compliant, which allows for easy export of data to third-party applications such as Microsoft Word and Excel. System utilities included with Toolbox allow for the import of payroll information, pricing lists, and customer and vendor information from third-party applications, as well.

REPORTING – 5 Stars

Toolbox offers a comprehensive list of reports, and all reports utilize the Crystal Reports data engine, which expands customization capability quite nicely. The Custom Reports and Forms function allows for the customization of both system reports and forms. As noted earlier, reports can be e-mailed, faxed, saved in PDF format or exported to third-party applications such as Microsoft Word and Excel. Reports can be customized by modifying adding, or eliminating columns, both in appearance and location.

SUPPORT & TRAINING – 4.5 Stars

System support is offered via telephone, directly from the Toolbox website, or by fax. Various training options are also offered and are listed on the vendor's website. Cost for training varies, with classes ranging in price from \$300 up to \$1,000.

RELATIVE VALUE – 4.5 Stars

Toolbox's Job Cost and Accounting Software is an easily navigated product that contains a wealth of features with a friendly user interface. Especially designed for midsize construction companies, Toolbox starts at \$6,100 for a single-user system.

This is an excellent choice for those looking for a combination of strength, extreme flexibility and ease of use.

2007 Overall Rating – 4.5 Stars

Article

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