



- ▶ Powerful CRM
- ▶ Bids & Estimates
- ▶ Job Management
- ▶ Billing & Invoicing
- ▶ Flexible Scheduling
- ▶ Dynamic Marketing
- ▶ Mobile Apps

business management
software for tree, lawn and
landscape businesses

Arborgold
BUILD A BETTER BUSINESS

lead & customer management

Access your contact's complete activity history including messages, appointments, estimates, work orders, invoices, and payments from your desktop, laptop, or mobile device.

- Store property photos, landscape designs, contracts, and other files at the contact record.
- Categorize, sort, filter, import, and export contact records in just a couple of clicks.
- Organize leads, clients, sub-contacts, and vendors with advanced contact fields and multiple job sites.

The screenshot displays the Arborgold CRM interface. On the left is a navigation sidebar with options like 'Getting Started', 'Dashboard', 'Customers', 'Map Center', 'Jobs', 'Scheduler', 'Job', 'DCM', 'Job Costing', 'Reporting', and 'Marketing'. The main area shows a contact record for 'Annsong 20191201' with fields for Contact (Betty Armstrong), Job Site (4504 S. Newwood Dr.), Salesperson (Johnson, Russ), and Job Type (Friday for Spruce H.). A 'Pricing/Coating' section on the right provides a summary of revenue, cost, and profit.

	Estimated	Scheduled	Completed
Job Total	\$8,500.00	\$0.00	\$0.00
Discount	\$0.00	\$0.00	\$0.00
Subtotal	\$8,500.00	\$0.00	\$0.00
Job Cost	\$1,780.00 (20.5%)	\$0.00 (0.0%)	\$0.00 (0.0%)
Gross Profit	\$6,719.00 (79.5%)	\$0.00 (0.0%)	\$0.00 (0.0%)
OH Cost	\$1,417.00 (17.0%)	\$0.00 (0.0%)	\$0.00 (0.0%)
Break Even	\$5,302.00 (62.4%)	\$0.00 (0.0%)	\$0.00 (0.0%)
Net Profit	\$5,106.00 (60.1%)	\$0.00 (0.0%)	\$0.00 (0.0%)

#	Item	Service	Description	Qty	Hours	Rate Hour	Price	Cost	Units	Tot. hrs	Est. Price	Tot. Cost	Status	Type	Project	Draw
1	Apple Crab	Prune	Prune to match existing crab up	1	5	100.00	\$500.00	\$36.55	1	5.00	\$500.00	\$36.55	Pending			Estimate 1
2	Landscape	Bed Maintenance	Includes hand weeding	1	2	54.50	\$300.00	\$30.49	18	30.00	\$4,500.00	\$381.00	Pending	Project	Land Maint 38V	Estimate 1
3	Lawn	Mow and Trim	All turf areas will be mowed a...	1	0.75	40.00	\$60.00	\$14.67	36	27.00	\$2,160.00	\$58.84	Pending	Project	Land Maint 38V	Estimate 1
4	Shrub & Ornate	Pruning Shrubs and Buaxes	Pruning will be completed ty...	1	4	55.00	\$220.00	\$76.80	2	8.00	\$440.00	\$187.60	Pending	Project	Land Maint 38V	Estimate 1
5	Lawn	Lawn Removal	Includes all beds and mulch...	1	19	35.00	\$665.00	\$197.00	2	20.00	\$700.00	\$394.00	Pending	Project	Land Maint 38V	Estimate 1



proposals & estimates

Arborgold's proposal and estimating features allow users to create bids quickly and easily in the office and on-the-go.

- Auto-calculate pricing based on service type, DBH, quantity, difficulty, square-footage, distance, or profit margin.
- Offer line-item pricing, grand totals and more.
- GPS map client tree and plant inventory.
- Estimate job costs within the bid.
- Include multiple service options and upsells.
- Include photos, Landscape CAD drawings, and lawn measurements.
- Brand your template with colors, logos, testimonials, and certifications.
- Print or email proposals and with digital client approval options.
- Manage your estimates and bids via Arborgold's opportunity pipeline.
- Automate your proposal follow-up with emails and text messages to your prospects.



Contract

Customer Information
Betty Armstrong
4304 S. Riverside Dr.
Bloomington, WI 47401
(314)647-1628

Company Information
Tree of Life
Landscape and Plant Health Care
312 West Grande Drive
Bloomington, IL 61704
317-242-2044
tally@arborgold.com

Description of Contract Work	Visits	Rate	Cost
(1) Prune Prune to match existing crab apple	1	\$500.00	\$500.00
(2) Garden Bed Maintenance Includes hand weeding	10	\$300.00	\$3,000.00
(3) Mow and Trim All turf areas will be mowed and trimmed on a weekly basis or as needed if drought conditions exist. Turf will be mowed using industry standards to maintain healthy turf. Once mowing and trimming is complete all road surfaces, walkway surfaces, beds, or any areas with debris will be blown off to maintain a neat appearance.	36	\$40.00	\$1,440.00
(4) Pruning Shrubs and Bushes Pruning will be completed by May 1st	2	\$220.00	\$440.00
(5) Leaf Removal Includes all beds and mulch areas	2	\$350.00	\$700.00
Total:			\$6,080.00
Monthly Contract Cost:			\$681.67

*No profits accept at near credit terms.
**All payments are due within 7 days of completion. A \$25 late fee will be applied every 30 days until the payment has been paid in full (unless other arrangements have been made).

Thank you for choosing Tree of Life Landscaping and Plant Health Care for your needs.

Sincerely Yours,
Rae Johnson

Acceptance of Quote
If you accept the above quote, please sign below or respond to the email verifying that you accept the quote.

Printed Name: _____
Signature: Betty Armstrong Date: _____

Tree of Life
www.TreeofLifeMD.com
4257 W Delap Rd
Bloomington, WI 47420
Fax: 6-800-853-1900

Armstrong 20191004

October 31, 2019

Proposal

Description	Cost
Prune	\$500.00
Prune to match existing crab apple	\$500.00
Garden Bed Maintenance Includes hand weeding	\$3,000.00
Mow and Trim All turf areas will be mowed and trimmed on a weekly basis or as needed if drought conditions exist. Turf will be mowed using industry standards to maintain healthy turf. Once mowing and trimming is complete all road surfaces, walkway surfaces, beds, or any areas with debris will be blown off to maintain a neat appearance.	\$1,440.00
Pruning Shrubs and Bushes Pruning will be completed by May 1st	\$440.00
Leaf Removal Includes all beds and mulch areas	\$700.00
Total:	\$6,080.00
Monthly Contract Price:	\$681.67

Date



messaging & appointment center

- Digitally capture view, and track phone calls, website leads, and other important incoming messages inside Arborgold.
- Manage and route messages and appointments to sales teams and crews through Arborgold mobile apps and text messaging.
- Integrate appointments with individual and group Google calendars and trigger automated appointment reminders via text message.

The screenshot displays the Arborgold software interface, divided into two main sections. The top section is the 'Appointment Scheduler', which features a calendar view for October 2019 and a map of the Bloomington, IN area. The map shows various locations marked with green icons, including Indiana University, New University, and several residential areas. The bottom section is the 'Message Detail' form, which contains the following information:

- Customer Information:** Customer: Betty Armstrong, Phone: Home (284)547-1635, Job Site: 4304 S. Norwood Dr. (Bloomington, IN) 47401, Ad Source: Facebook.
- Call Information:** Call Date: 10/4/2019, Call Time: 10:00 AM, Completed: , Completed Date: .
- Employee Information:** Message To: Rev Johnson, Message By: Donna Garner.
- Message Type:** Please Call: , Returned Call: , Cancel Work: , Schedule Work: , Estimate Work: , Estimate Date: .
- Appointment Information:** Appointment Date: , Start Time: , End Time: .
- Subject:** Needs estimate on pruning and maintenance.



scheduling

Your business management tool should match the way you do business. Arborgold's feature-rich work scheduler doesn't disappoint.

- ▶ Drag and drop calendar interface.
- ▶ Scheduling available on browser and mobile apps.
- ▶ Schedule and assign jobs by territory, service, or crew.
- ▶ Interactive Map Scheduling.
- ▶ Filter, find, and schedule one or multiple jobs in just a couple clicks.
- ▶ View jobs and revenue by current work order status.
- ▶ View revenue pipeline by work order status.

The screenshot displays the 'Work Scheduler' interface. On the left, a calendar view for Monday, September 30, 2019, shows various jobs scheduled throughout the day, such as 'Mow and Trim' at 6:00 am and 'Lawn Mowing' at 9:00 am. On the right, a detailed job list is visible, including jobs like 'ABC Landscape 201903011' (Snow Removal) and 'Alexander 20191113' (Snow Removal). The interface includes navigation tabs for 'Today', 'Month', 'Week', and 'Day', and a search bar for 'Job Name'.

types

- ▶ Multi-day Scheduling
- ▶ Successor Scheduling
- ▶ Individual Services Scheduling
- ▶ Recurring Services Scheduling
- ▶ Ongoing Services Scheduling



billing & invoicing



Businesses can run smoothly with accounting and invoicing software that can do it all. Organize and grow your business with features.

- ▼ Completed jobs are automatically queued up for invoicing.
- ▼ Batch invoice multiple jobs.
- ▼ E-send and print invoice delivery options.
- ▼ Manage accounts receivable including outstanding balances, prepayments, deposits, and partial payments.
- ▼ Seamless integration with credit card merchant processing and e-pay options.
- ▼ Custom Invoicing templates including logos, certifications, testimonials, and terms and conditions.
- ▼ Give your customers access to view statements, approve estimates, and pay bills online, 24/7.
- ▼ Seamless integration with QuickBooks Online and QuickBooks Desktop.*
- ▼ Send automated text messages when invoices are marked as paid.

The screenshot displays the Arborgold software interface. On the left, an 'Email' editor window is open, showing fields for 'Email Template' (set to 'Invoice'), 'From' (office@arborgold.com), 'To' (mary@abc.com), and 'Subject' (Your invoice is ready). The body of the email contains a message about an attached invoice and contact information for Alex Thomas. On the right, a 'Preview' window shows a professional invoice for 'Tree of Life Landscaping and Plant Health Care'. The invoice includes a logo, company address, a table for 'Bill To' and 'Job Location', and a table for 'Item' and 'Rate'.

Item	Description	Qty	Rate
Lawn	Lawn (App #1) Fertilization with Pro-Emergent Weed Control	1.00	\$109.50



training events & bootcamps



Offered regionally across the United States, Arborgold offers users small group, in person software training classes designed to quickly onboard users with product features and enhancements.

international users conference

Our signature conference, Arborgold brings together its valued clients for a three-day interactive event packed with industry subject matter experts, technical trainers, and Arborgold leadership to network, share ideas, and plan product enhancements.



supply chain management

When lawn, landscape, pest, and tree care companies maintain proper levels of chemical and plant material inventory for scheduled or pending jobs, they improve cash flow and reduce overall direct costs.

Arborgold's Supply Chain Management features includes the ability to:

- ▶ **Predict Inventory Needs.** Compare your inventory to pending bids to predict what inventory will need to stock.
- ▶ **Maximize Vendor Relationships.** Keep a close eye on vendor rates and purchase history to compare best prices and bulk-buy options, and easily reorder inventory when needed.
- ▶ **Master Job Costing.** Improve bid accuracy and cash flow by directly connecting inventory costs to estimates as well as reviewing actual vs. plan, in real-time.

Item Name	Stocked	C	S	P	Stocked(C)	PO Lot. C	Stocked(S)	PO Lot. S	Stocked(P)	PO Lot. P	Cor. Del.	PO Status	Stock
0-0-00 Sprinkler - Potassium	102 ea	0 ea	0 ea	0 ea	112 ea	0 ea	112 ea	0 ea	112 ea	0 ea	0 ea	0 ea	Stocked

Stocked	Services Completed (C)	Services Scheduled (S)	Services Pending (P)	Stocked(CSP)
112 ea	37 ea	22 ea	0 ea	112 ea

Rank	Vendor	Order Rate Name	Order Rate	Usage Qty	Price	Unit Cost
1	Agri Supply	PHOSPHAT Liquid Sol	15 lb	102 ea	\$10.20	\$2.10

PO Name	SI #	Vendor	Ordered Qty	PO Cost	SI Cost	Usage Qty	Status	PO Type	Origin Type	Stock ID
Agri Supply - 20195	NA	Agri Supply	0 ea	\$100.00	NA	10 ea	Accepted	Inventory	PO	78
Agri Supply - 2294	105-40	Agri Supply	3.84 lb	\$1.20	\$2.25	22 ea	Stocked	Inventory	PO	82
Agri Supply - 0719207	NA	Agri Supply	12 lb	\$10.00	NA	102 ea	Accepted	Inventory	PO	84
NA	NA	NA	NA	NA	NA	22 ea	NA	Inventory	Manual	84

Item Name	On Hand	Scheduled	Pending	PO Cost	SI Cost	Usage Qty	Status	PO Type	Origin Type	Stock ID
0-0-00 Sprinkler - Potassium	0 ea	0 ea	0 ea	0 ea	0 ea	0 ea	0 ea	0 ea	0 ea	0 ea
10-0-4 Granulu 40% Slow release + weed control	0 ea	80 ea	80 ea	\$2,270 ea	0 ea	80 ea	0 ea	80 ea	0 ea	0 ea
10-0-4 Granulu Slow release	0 lb	22 lb	0 lb	0 ea	0 ea	22 ea	0 ea	22 ea	0 ea	0 ea
10-0-0 Granulu Fertilizer w/Dimensional	0 ea	0 ea	0 ea	0 ea	0 ea	0 ea	0 ea	0 ea	0 ea	0 ea
20-0-11 Granulu 20% Slow Release	1 ea	22 ea	47 ea	0 ea	0 ea	0 ea	0 ea	0 ea	0 ea	0 ea



mobile apps

Today's fast paced means you're salespeople, crews, and leadership need access to client and lead information wherever there are.

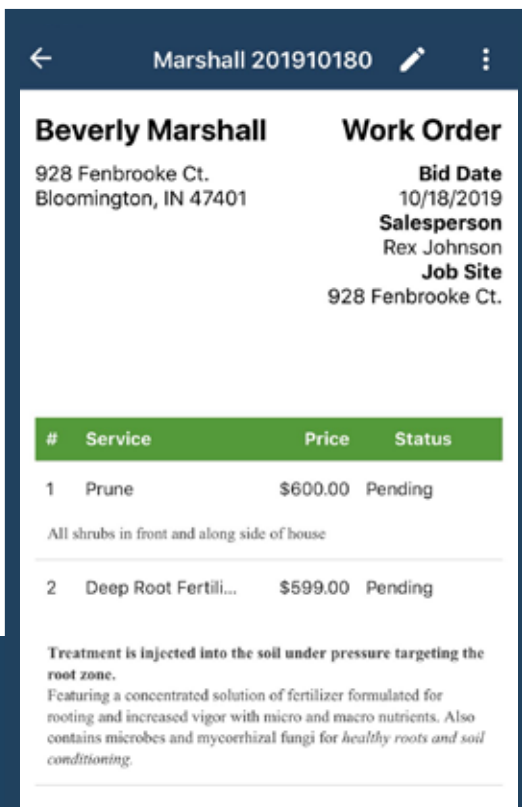
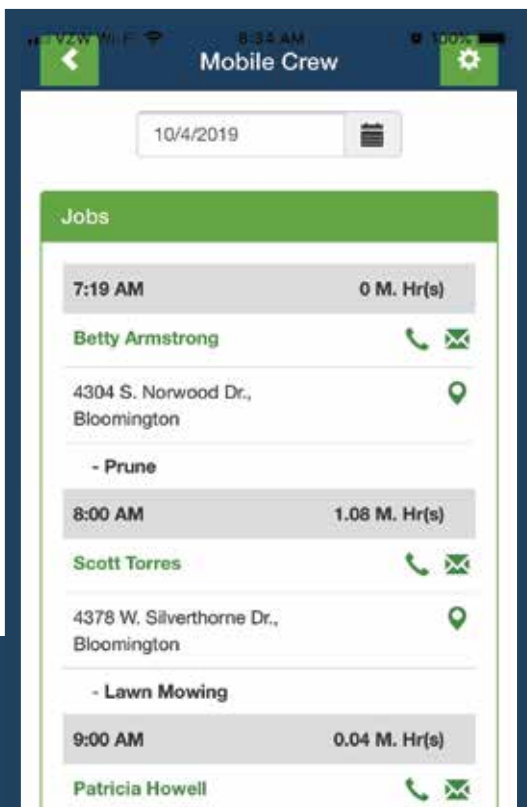
Arbrogold's mobile apps connect your office with the field real-time.

PRODUCTION CREWS

- Time-track crews for job time, travel time, and break time, etc.
- View routes and directions.
- Add services to jobs on-site.
- Click to call or text.
- Complete jobs and invoice clients on-site.
- Track inventory and materials.
- View and upload landscape drawings, images, and inventory health status.
- Report weather and chemical usage.

SALES & EXECUTIVES

- View, edit and update messages and appointments in real-time.
- Generate estimates, bids and quotes with landscape designs, photos, and lawn measurements.
- Auto-price estimates based on service type, territory, equipment, and/or materials.
- Job Scheduling.
- Detailed contact history including estimates, jobs, notes, appointments, and invoices.



client tree & plant inventory

With tree and plant inventory management software, your company has access to a complete database of information that allows you to provide 5-star service to your clients.

- Using Arborgold's client inventory management features, you're able to proactively reach out to customers with services add-ons based on seasons or during emergency insect and disease outbreaks.
- Document accurate GPS location for any tree or plant asset both on and off-site.
- Maintain a detailed inventory of your clients' trees and other plant assets including age, condition, DBH, diameter, canopy size, and height.
- Store unlimited asset photos, include notes, and apply filtering tags.
- Search customer inventory records by tree type, service type, condition, or location.

Plant Detail

Item # * 34 Item * Apple (Crab)

Name * #34 Apple (Crab)

Birth Date [] Age 0 Condition Vigor - Normal

Qty 1 DBH 12

Height 28 Canopy 14

Trunks 0

Tags Damaged by storm Near Power Line

Location []

Notes []

Created By: Hayden Holmes On: 10/24/2018

Last Modified By: ArborGoldAdmin On: 4/8/2019

Arborgold

Address: 4237 W Delap Rd Ellettsville, IN 47429

Map Satellite

Plant Inventory - Total: 30

#	Item	Measuring Tool	Plant Inventory
34	Apple (Crab)		
33	Apple (Crab)	K29 Apple (Crab)	# 34 11
32	Apple (Crab)	K32 Apple (Crab)	# 22 12 Backyard
31	Vineyard	#31 Vineyard	0 0 30000
30	Apple	#30 Apple	8 20 10
29	Sin (Siberian)	#29 Sin (Siberian)	4 18 10 Front
28	Alder	#28 Alder	10 10 20 Front lawn
27	Oak	#27 Oak	15 80 40
26	Oak	#26 Oak	15 80 40
25	Oak	#25 Oak	15 80 40

09

marketing

Instead of using multiple programs for email, text, and voice broadcasting, Arborgold's integrated marketing offers an all-in-one solution. We take the technology pain out of automated marketing.

- ▶ Quickly email or print repeat service offers to existing clients through Arborgold's renewals feature.
- ▶ Segment and send email broadcasts to your lead and client lists for important promotions.
- ▶ Customize and automate your sales follow-up with drip marketing campaigns to help you win the bid.
- ▶ Search, filter, and find clients and leads for cross-selling, upselling, and remarketing campaigns.
- ▶ Use Arborgold's integrated voice broadcasting features for appointment reminders, job notifications, etc.
- ▶ Capture and route leads and client "Contact Us" inquiries from your website with Arborgold integrated web forms.

Our Annual Pre Pay Offer for 2012
For service at: 1350 W Adams Hill Cir

Tree of Life
Lawn Care, Tree Care, Health Care

513 West Granite Drive, Bloomington, IN, 47404 Ph. 574-952-0048

Billing Address
Nantula
Nemo Dikkar
1350 W Adams Hill Cir
Bloomington, IN 47403
574-952-0048

Instructions:
No price increase for 2012.
By Pre Paying for the 2012 season you can take advantage of our 10% discount which expires
2/15/2012
Discount becomes 5% as of 2/16/2012

This proposal was created for the sole purpose of providing the labor and materials stated below in accordance to ANCI A300 standards. If you have any questions about the services outlined below please feel free to call our office at (574) 952-0048.

Scheduled Services	Pay As You Go Price	Pre Pay Price
Lawn App 1 - Early Spring Fertilizer Application - Pre-Emergence Crabgrass Control Application	\$150.00	\$135.00
Lawn App 2 - Early Summer Fertilizer Application - Organically Enriched Fertilizer and Broadleaf Weed Control Application	\$150.00	\$135.00
Lawn App 3 - Late Summer Application Fertilizer Application - Third Organically Enriched Fertilizer and Broadleaf Weed Control Application (If Needed)	\$150.00	\$135.00
Lawn App 4 - Fall Application Fertilizer Application - Fourth Organically Enriched Fertilizer and Broadleaf Weed Control Application	\$150.00	\$135.00
Tree-care (Low Rate) -	\$49.50	\$44.55

	Pay as you go Totals	Pre Pay Totals
Subtotal	\$649.50	\$594.27
Tax	\$43.47	\$40.92
Total	\$692.97	\$635.19
You Save	\$0.00	\$109.50

Pay Online NOW! to pay through the NEW Customer Portal click the blue link
<https://treeoflife.arborgold.net/ep/login>
To establish an account if you haven't already you will have to register with the email that this proposal was sent to and...
Your account number: 446528
Your Zip Code: 47403

Print or cut along dotted line and return with payment.

I would like to Pre Pay for the Season

Nemo Dikkar For service at 1350 W Adams Hill Cir

I would like to pay \$_____ by Credit Card

Card Number: _____
Exp Date: _____
Signature: _____

I am enclosing a check for \$_____

Page 1 of 2

project & job management

Arborgold's Job and Project Management features closely connect the office with the field and allow companies to track and manage every aspect of the job during each stage.

- View job service details from Arborgold Mobile Apps.
- View job CAD drawings or review client tree and plant inventory.
- Store progress photos and document health and important visit information.
- Record weather, chemicals, and other material inventory.
- Add services to any job, at the job site.
- Mark jobs as completed from the field.
- Invoice on site.
- Track direct and indirect labor hours.
- Track crews via GPS.
- Create crew checklists.
- View, schedule, and manage multiple services inside a single project timeline.

The screenshot displays the Arborgold software interface. At the top, there's a navigation bar with the Arborgold logo and a search bar. Below that, a sidebar on the left contains various menu items like 'Getting Started', 'Dashboard', 'Customers', 'Map Center', 'Jobs', 'Scheduler', 'All', 'SCM', 'Job Costing', 'Reporting', 'Reports', 'Visualizations', and 'Marketing'. The main area shows a table of jobs and projects. The table has columns for Job Name, Service, Customer, Subscription, Job Status, Job Date, Qty, Price, Cost, Status, Job Date, Type, Est. Crew, and Job Crew. The data is organized into sections for different job names, such as 'Job Name: Adam 20191018' and 'Job Name: Alvaraz 20191024'. Each section lists specific services like 'Paver Patio River Front', 'Leaf Removal', 'Mow and Trim', 'Garden Bed Maintenance', and 'Pruning Shrubs and Bushes' with their respective dates, quantities, prices, and costs.

Job Name	Service	Customer	Subscription	Job Status	Job Date	Qty	Price	Cost	Status	Job Date	Type	Est. Crew	Job Crew
* Job Name: Adam 20191018													
* Project: Paver Patio River Front													
	Paver Patio	Adam 20191018	Dennis Adam	Rex Johnson	Work Order	10/18/2019	849.00	\$224,330.72	\$102,304.21	Scheduled			
* Job Name: Alvaraz 20191024													
* Project: Land Maint 30V													
	Leaf Removal	Alvaraz 20191024	Edward Alvaraz	Brad Martin	Work Order	10/24/2019	0.21	\$100.00	\$0.00	Pending			6
	Mow and Trim	Alvaraz 20191024	Edward Alvaraz	Brad Martin	Work Order	10/24/2019	0.75	\$75.00	\$0.00	Pending			36
	Garden Bed Maintenance	Alvaraz 20191024	Edward Alvaraz	Brad Martin	Work Order	10/24/2019	3	\$40.00	\$0.00	Scheduled			36
	Garden Bed Maintenance	Alvaraz 20191024	Edward Alvaraz	Brad Martin	Work Order	10/24/2019	2	\$40.00	\$39.40	SOH - 10/31/2019	10/3/2019		Estimating Crew - 1
	Pruning Shrubs and Bushes	Alvaraz 20191024	Edward Alvaraz	Brad Martin	Work Order	10/24/2019	2	\$110.00	\$0.00	Pending			2
* Job Name: Armstrong 20190928													
* Project: Paver Patio River Front													
	Paver Patio	Armstrong 20190928	Doris Armstrong	Rex Johnson	Work Order	9/28/2019	13.33	\$9,816.53	\$684	SOH - 9/28/2019	9/28/2019		General Crew- Rex
* Job Name: Armstrong 20191003													
* Project: Land Maint 30V													
	Leaf Removal	Armstrong 20191003	Betty Armstrong	Rex Johnson	Work Order	10/3/2019	0.57	\$100.00	\$0.00	Pending			6
	Garden Bed Maintenance	Armstrong 20191003	Betty Armstrong	Rex Johnson	Work Order	10/3/2019	0	\$0.00	\$0.00	Scheduled			36
	Garden Bed Maintenance	Armstrong 20191003	Betty Armstrong	Rex Johnson	Work Order	10/3/2019	0	\$0.00	\$49.25	SOH - 10/4/2019	10/4/2019		Mowing Crew

learn power of arborgold in minutes



Discover why today's leading companies use Arborgold to acquire more customers, serve their customers well, and create repeat business year-after-year.

▶ ▶ ▶ TAKE A TOUR AT ▶ ▶ ▶
ARBORGOLD.COM/TOUR

take a tour



- Centralize your customer and lead database
- Improve your bidding process
- Automate follow-up
- Schedule more efficiently
- Track crews and reduce overhead costs
- Simplify invoicing & billing.
- That's Arborgold!





plans, pricing & online demo
at arborgold.com



arborgold.com

give us a call: 800.933.1955