Hi. Welcome to this preview of the Launchpad.

One complete package, built from 70+ implementations.

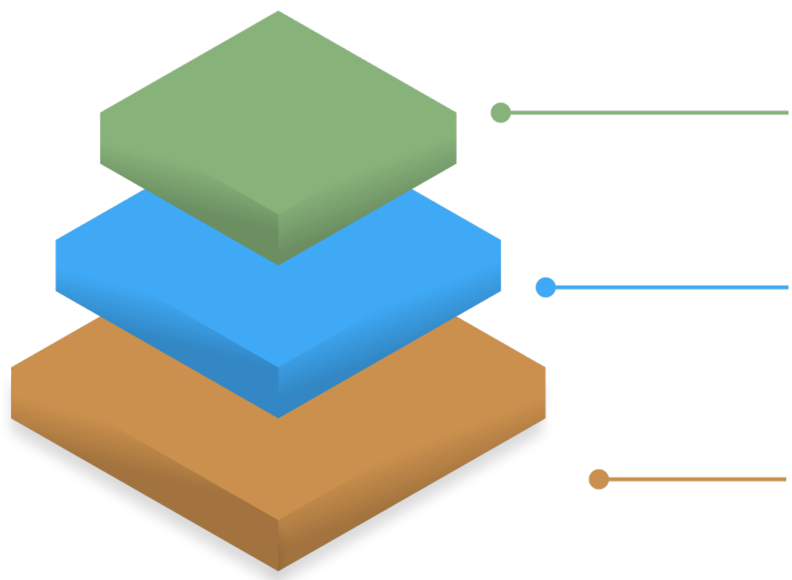
From the team at

Smith+Co

smithandco.ltd

Our Goal: Your AAA JobTread System

The AAA JobTread System is our blueprint from 70+ implementations for translating your existing processes into a JobTread system that actually works in your company.



AUTOMATIC

JobTread is an intelligent team member that helps you grow without the growing pains

ACTIONABLE

JobTread is designed for each role, workflow, and action that should happen at the right time

ACCURATE

JobTread is implemented with the right sales, project management, and finance data

ACCURATE – BUILD THE FOUNDATION

Half the battle of setting up JobTread right is making the basics bulletproof. Configure JobTread with the right templates and the right data, and train your team to get started, so your system gets you out of Excel and produces trustworthy information.

ACTIONABLE – CONFIGURE FOR EACH ROLE

Data sitting in a system doesn't run your business. Making an actionable JobTread means role-specific views, dashboards, and notifications so the right information surfaces to the right person at the right time — no more hunting through screens.

AUTOMATIC – ELIMINATE THE MANUAL GRIND

Once the foundation is in place, automate the repetitive work from your estimating workflows and billing sequences to schedule updates and data reporting. Use JobTread's native workflow tool, Zapier, and custom integrations.

Preview the DIY Guidebook

You're here because you want to get JobTread right.

Maybe you just signed up. Maybe you've been paying for it for months but haven't made the leap. Either way, you're staring at a powerful piece of software and thinking: **"Where do I even start?"**

You're not alone. We hear it every week from contractors just like you.

That's exactly why we created **Launchpad**, a complete DIY implementation kit built from everything we've learned across 70+ JobTread implementations.

What's Inside Launchpad

When you purchase Launchpad, you get instant access to:

1. The 10-Step Implementation Roadmap

The exact sequence we use with our $20K implementation clients. What to configure first, what to skip until later, and why the order matters.

2. AAA One-Click Install

Our best-practice settings for roles, permissions, notifications, custom fields, views, dashboards, and templates—installed in your JobTread account with a few clicks. Hours of setup, done in minutes.

3. 100+ Page DIY Guidebook

Step-by-step checklists for every phase: data entry, templates, QuickBooks integration, custom fields, dashboards, team training, and more. Every item links to a written or video explainer.

4. QBO Sync Masterclass (90 Minutes of Video Training)

The QuickBooks integration is where most DIY implementations break down. This course walks you through setup, the cost code mapping system, and troubleshooting the problems we see on almost every implementation.

5. The Success Guarantee

What You're Getting in This Preview

The following pages contain **5 checklists pulled directly from the full guidebook**. These are real, actionable items you can start using today, whether or not you buy Launchpad.

Consider this a taste of what the full package delivers.

1. From Step 1: **Job and Location Information**
2. From Step 2: **Change Order Document Template**
3. From Step 2: **Customer Permissions for Customer Portal**
4. From Step 4: **Custom Fields on Customers**
5. From Step 5: **Default Custom Views by Role**

Thanks for downloading this free preview.

STEP 1 — DATA ENTRY AND DEFAULT SETTINGS

Job and location information

WHY THIS MATTERS

Jobs are the core of JobTread. Almost everything (budgets, schedules, documents, invoices) lives inside a job. If your job and location structure isn't set up correctly from the start, you'll be fighting the system instead of using it.

HOW WE THINK ABOUT THIS

Jobs are nested within locations, which are nested within customers. How you handle this depends on whether you do residential or commercial work:

- **Residential:** Typically one customer → one location → one job. Simple and straightforward.
- **Commercial:** Often one customer → multiple locations → one or more jobs per location. More complex, but JobTread handles it well.

Not everything needs to come over from your old system. Here's our framework:

✔ Always Migrate	⚠️ Usually Migrate	× Rarely Migrate
Active customer/client list	Open estimates/proposals	Jobs in production
Active vendor/supplier list	Jobs in early stages	Historic job data
Cost codes + catalog	Key vendor pricing	Old schedules/tasks
Document templates		Archived files

What we usually recommend: Set a cutoff date. Old jobs stay in your existing system until complete. New jobs start in JobTread after that cutoff date. This gets you live faster and avoids the mess of migrating mid-production jobs.

WHAT TO ACCOMPLISH

Create or import your jobs with accurate locations nested under the correct customers. If you're migrating, decide on your cutoff date and only bring over jobs that make sense.

OUR RECOMMENDATION

- ☐ **Start fresh with new jobs.** Don't try to migrate your entire job history. Set a cutoff date and commit to it.
- ☐ **Close out jobs in production in your old system.** Migrating a job mid-production creates a mess. Half the data in one system, half in another. Finish what you started, then move on.
- ☐ **Match your structure to your business.** Residential contractors: keep it simple with one location per customer. Commercial contractors: take the time to set up multiple locations under your repeat customers now. It'll pay off when you're three jobs deep with the same client.
- ☐ **Verify the hierarchy.** Before moving on, spot-check that jobs are nested under the right locations, and locations are nested under the right customers.

> 💡 **PRO TIP:** If you're migrating from another system and feeling overwhelmed, remember: you don't need to bring everything. The goal is to get live and start building accurate data going forward, not to perfectly recreate the past.

RESOURCES

- ☐ → JobTread Help: Create a New Job

STEP 2 — DEFAULT TEMPLATES

Change order document template

WHY THIS MATTERS

Change orders are where scope creep becomes profitable, or where it eats your margin. A well-formatted change order template makes it easy to document additional work, get customer approval, and keep your budget accurate.

WHAT TO ACCOMPLISH

Customize your change order template in Settings → Document Templates → Customer Orders. The same formatting options from your proposal templates apply here.

OUR RECOMMENDATION

- ☐ **Apply the same logic as your proposal templates.** Show/hide line items, amounts, quantities. Whatever makes sense for how you communicate changes to customers. Review the formatting options and set your defaults.
- ☐ **Add legal language to the footer.** Change order terms, payment expectations, how changes affect the schedule. Whatever your lawyer or experience tells you to include.
- ☐ **Consider adding a thank-you footer.** We don't often see cover pages on change orders, but a simple footer ("Thank you for your business") adds a professional touch.
- ☐ **Use the Design tab if needed.** Same as proposals. You can upload header/footer PDFs to match your brand.
- ☐ **Test it with a real scenario.** This is where the rubber meets the road. Go into a test job, create a change order, and see how it looks. You'll quickly see if your estimate/budget template structure works well for change orders, or if you need to make adjustments.

> 💡 **PRO TIP:** How your change order looks depends heavily on how you structured your estimate template. If the change order output looks weird, the fix might be in your estimate structure, not the change order template itself. Use this as a gut-check.

RESOURCES

- ☐ → JobTread Help: [Document Templates]
- ☐ → JobTread Help: [Change Orders]

STEP 2 — DEFAULT TEMPLATES

Customer permissions for customer portal

WHY THIS MATTERS

When your customers log into JobTread, what they see (and don't see) is controlled by these settings. The default Customer role gives access to a lot of internal stuff (daily logs, job plans, schedules) that can overwhelm customers and expose details you'd rather keep private. A few minutes of configuration creates a cleaner experience for them and protects your internal operations.

HOW WE THINK ABOUT THIS

Start restrictive. It's easy to give customers more access later if they ask for it. It's awkward to take access away after they've gotten used to seeing everything.

The default Customer role in JobTread is less permissive than most builders want. We recommend opening things up intentionally based on your business model and customer relationships.

Preview before you grant access. JobTread lets you see exactly what a customer will see in their portal. On any job, find the customer contact, click the three-dot menu, and select "Preview Portal As [Customer Name]." Do this before inviting customers to the portal. It takes 30 seconds and prevents uncomfortable surprises.

WHAT TO ACCOMPLISH

Configure the default Customer role to show customers only what's relevant to their project. Find this in Settings → Roles → Customer.

OUR RECOMMENDATION

Permission settings (start here):

- ☐ **Schedules:** Set to "View-only" for "Only assigned tasks." Customers see tasks that need their action without seeing your full production schedule.
- ☐ **To-Dos:** Set to "Update progress" for "Only assigned to-dos." Same idea. They see what's assigned to them, nothing more.
- ☐ **Daily Logs:** Set to "View" for "All" and disable "View daily log custom fields." This way you show daily logs to customers, but they won’t see your internal-only custom fields.
- ☐ **Job Plans:** Toggle OFF. Most customers don't need to see your takeoff measurements.
- ☐ **Job Specifications:** Toggle OFF. Unless you're actively using specs with customers, hide this tab.
- ☐ **Job Budget View:** Set to "No access." You might change this later once you have configured your own custom budget view. For now, they'll see what they need on invoices and proposals.

- ☐ **Files:** Set to "Only files with these tags or folders" and the "Customer" tag. This means only files you intentionally tag for customer visibility will show up. Everything else stays internal.

Notification settings (reduce the noise):

Enable notifications only for:

- ☐ Invoices (they need to know when to pay)
- ☐ Customer Orders (proposals and contracts)
- ☐ Tasks assigned to them
- ☐ Messages directed to them

Disable "participating" notifications for documents. This prevents customers from getting pinged on every internal document update.

Test it before going live. Use the "Preview Portal" feature to see exactly what your customers will see. If something shows up that shouldn't, adjust the settings and preview again.

> 💡 **PRO TIP:** How much transparency you offer is a business decision, not a technical one. Some builders share everything with clients; others keep it minimal. These recommendations are a solid starting point for most builders. Adjust based on your relationships and contracts.

RESOURCES

- ☐ → JobTread Help: Customer Portals
- ☐ → JobTread Help: Roles and Permissions

STEP 4 — CUSTOM FIELDS AND VIEWS

Custom Fields on Customers

WHY THIS MATTERS

Some data belongs on the customer, not the job. This is especially true if you work with repeat customers or if you track leads before they become jobs. Getting this right lets you report on customer-level trends and (if you want) use JobTread as a lightweight CRM.

WHAT TO ACCOMPLISH

Add custom fields on customers to track important data at the customer level. Find these in Settings → Custom Fields → Customer Accounts.

OUR RECOMMENDATION

- ☐ **Decide what belongs on the customer vs. the job.** This depends on your business:
  - ☐ **One job per customer?** Track things like Lead Source on the customer. You'll only have one anyway.
  - ☐ **Multiple jobs per customer?** Track Lead Source on each job, since different jobs might come from different sources.
  - ☐ **High volume with lots of leads?** You might track pipeline stages at the customer level (more on this below).
- ☐ **Consider using customer stages as a lightweight CRM.** If you have a lot of leads that never make it to the estimating stage, you don't want to create jobs for all of them. It clutters your job list. Instead, create a "Stage" field on customers to track where they are in your sales process (New Lead, Contacted, Qualified, etc.). Only create a job when they're ready for an estimate. This keeps your job list clean and your lead tracking intact.
- ☐ **If you do create customer stages, add a "Job Created" stage.** This is your catch-all that signals the customer has moved from lead tracking to active job tracking. When a job is created, update the customer stage to "Job Created" or "Active Job" so you know they've graduated out of the lead funnel.
- ☐ **Track customer-level data that applies across all their jobs.** Things like: how they prefer to be contacted, important dates (birthday, anniversary if you do that kind of relationship building), or notes about working with them.
- ☐ **Same rule as jobs: don't add fields you won't use.** Empty fields are clutter. Start with a few that matter, and add more as you identify gaps.
- ☐ **Customer custom fields can power reports too.** If you want to see "customers by lead source" or "customers by stage," you need those fields here. Think about what you'll want to report on.

💡 **PRO TIP:** The "customer stages as CRM" approach works great for high-volume companies with lots of tire-kickers. You can track hundreds of leads at the customer level without creating hundreds of jobs you'll never win. Once they're qualified and ready for an estimate, *then* create the job.

RESOURCES

- ☐ → JobTread Help: Custom Fields - Customer Accounts

STEP 5 — ROLES, PERMISSIONS, AND NOTIFICATIONS

Default custom views by role

WHY THIS MATTERS

In Step 4, you created custom views—filtered, sorted ways of looking at jobs, budgets, documents, and schedules. Now you can assign different default views to different roles, so each team member starts with the most relevant perspective for their work.

WHAT TO ACCOMPLISH

Assign default views to each role so team members see the right data when they log in. Find this in Settings → Roles → [Select Role] → Custom Views section.

OUR RECOMMENDATION

- ☐ **PMs might default to:**
  - ☐ Jobs: Active jobs only, sorted by next milestone
  - ☐ Budget: Full job costing view with all financial columns
  - ☐ Documents: All document types
  - ☐ Schedule: Entire project view
- ☐ **Field leads might default to:**
  - ☐ Jobs: Only jobs they're assigned to
  - ☐ Budget: Material ordering view (if you created one)
  - ☐ Schedule: Task list view filtered to incomplete tasks
- ☐ **Bookkeepers might default to:**
  - ☐ Jobs: All jobs (they touch everything)
  - ☐ Budget: Financial view with invoiced/paid columns
  - ☐ Documents: Filtered to invoices and bills
- ☐ **Make views organizational, not personal.** For a view to be assignable as a role default, it needs to be shared with the organization. Personal views only work for the person who created them.
- ☐ **Users can switch views.** Default views set the starting point, but anyone can manually switch to a different view while working. Defaults just save time and reduce confusion.
- ☐ **The AAA One Click Install includes pre-built views.** If you used our defaults, you already have views configured. Review them and assign them to roles—or create your own.

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This is optional. If you haven't created custom views yet, or if the defaults work fine, skip this for now. You can always come back and set role-specific defaults later.

> 💡 **PRO TIP:** Default views are most valuable when different roles need to see genuinely different data. If everyone looks at the same stuff, don't overthink it. But if your bookkeeper and your PM live in different parts of JobTread, role-specific defaults make their lives easier.

RESOURCES

- ☐ → JobTread Help: Roles and Permissions
- ☐ → JobTread Help: Custom Table Views

✓ PREVIEW COMPLETE

DIY Guidebook Preview

Ready for the Full Roadmap?

These 5 checklists are just a sample. The complete Launchpad includes:

- **100+ pages** of step-by-step checklists
- **90 minutes** of QBO Sync training videos
- **AAA One-Click Install** of our best-practice templates and settings
- **10-Step Implementation Roadmap** for you to use

Get Launchpad for $499 (regularly $999).

Special pricing for JobTread Connect ends January 20th.

→ smithandco.ltd/launchpad

About Smith + Co

Skip the endless tutorials and manual workarounds that leave most contractors using only a fraction of JobTread. Smith + Co has the exact blueprint to get you fully dialed in with multiple options of support.

Working with Smith + Co helped us unlock JobTread's full potential. Their guidance streamlined our workflows and gave us tools we use every day to run projects more smoothly. I'd highly recommend them to anyone looking to get the most out of JobTread!

EVAN HILL, CREATIVE CABINETS & FINE FINISHES

What's unique about Smith + Co is they see different people's brains and the different ways people operate and figure out how JobTread needs to work for them. They're very good at figuring out the best solutions for you and never propose only a standard solution.

IAN GRAY, GRAY PACIFIC CUSTOM BUILDERS

Get in touch today

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