OPERATIONS FEATURE MENU

Pick the features you want.

Everything a Sandbox Synergy system can do for your business, in plain language. Mark each item **Want**, **Maybe** or **Don't need**, or answer a whole section at once, then send it to us. Every item is labelled honestly: Available now, Beta (works, a few gaps), Coming soon, or Custom build.

1. Front end

What your customers see and do: your website and their customer account.

Whole section
☐ Want ☐ Maybe ☐ Don't need

Inputs

What your customers enter.

All in inputs
☐ Want ☐ Maybe ☐ Don't need

Instant quote request Available now

Customers pick items or services, see an estimate on screen and send the request. Consent is recorded and bots are filtered out. Entered by: Customer.

☐ Want ☐ Maybe ☐ Don't need

AI website chat Available now

Answers questions from your own information, labelled as AI, and takes callback requests when it doesn't know. Entered by: Customer.

☐ Want ☐ Maybe ☐ Don't need

AI phone answering Coming soon

An AI answers your business line, takes messages and books callbacks. Entered by: Customer.

☐ Want ☐ Maybe ☐ Don't need

Careers / job application form Available now

Applicants apply online and answer your screening questions. Entered by: Applicant.

☐ Want ☐ Maybe ☐ Don't need

Approve and e-sign a quote Available now

Customers open a private link, review line items and approve with a typed signature, or decline. Entered by: Customer.

☐ Want ☐ Maybe ☐ Don't need

Pay an invoice online by card Beta

Customers look up an invoice and pay. Money goes straight to your own payment account, never ours. Entered by: Customer.

☐ Want ☐ Maybe ☐ Don't need

Deposit when a quote is approved Coming soon

Collect a deposit at the moment the customer signs. Entered by: Customer.

☐ Want ☐ Maybe ☐ Don't need

Leave a review / testimonial Available now

Customers share feedback and give permission before anything is shown publicly. Entered by: Customer.

☐ Want ☐ Maybe ☐ Don't need

Outputs

What your customers get back and see.

All in outputs

☐ Want ☐ Maybe ☐ Don't need

Branded website Available now

Home page with your photos, services, how it works, reviews and a clear call to action, in a design template you choose.

☐ Want ☐ Maybe ☐ Don't need

Catalog / services list Available now

Full list of your services or equipment, with live availability from your inventory.

☐ Want ☐ Maybe ☐ Don't need

On-screen estimate Available now

Instant price estimate from your own rates.

☐ Want ☐ Maybe ☐ Don't need

Invoice page, PDF and receipt Available now

A clean invoice page customers can view, download and pay from.

☐ Want ☐ Maybe ☐ Don't need

Job status lookup Available now

Customers enter a job number plus their phone or email to see status and scheduled day.

☐ Want ☐ Maybe ☐ Don't need

Service-area pages Available now

One page per town you serve so local customers can find you.

☐ Want ☐ Maybe ☐ Don't need

Privacy, Terms and text-message consent pages Available now

Written for your business and served on your own domain.

☐ Want ☐ Maybe ☐ Don't need

Link preview card Beta

When your site is shared, a branded preview image shows your name and photo.

☐ Want ☐ Maybe ☐ Don't need

Records

What your customers can look up themselves.

All in records
☐ Want ☐ Maybe ☐ Don't need

Invoice and receipt history Available now

Customers request a secure 24-hour link by email and see their past invoices and receipts.

☐ Want ☐ Maybe ☐ Don't need

Shared documents Available now

Certificates of insurance, W-9s, signed paperwork: files you choose to share, available through short-lived private links.

☐ Want ☐ Maybe ☐ Don't need

Signed quote record Available now

Every approval or decline is kept with the typed name, time and the quote it applied to.

☐ Want ☐ Maybe ☐ Don't need

Automation

What happens on its own when customers interact.

All in automation
☐ Want ☐ Maybe ☐ Don't need

Instant staff alert on new requests Available now

Quotes, callbacks, applications and quote responses alert your team by email and in the app.

☐ Want ☐ Maybe ☐ Don't need

Website chats saved Available now

Every website chat is saved and searchable in your dashboard.

☐ Want ☐ Maybe ☐ Don't need

Consent and opt-out handling Available now

Consent is recorded on forms; customers who reply STOP are never texted again.

☐ Want ☐ Maybe ☐ Don't need

Only approved reviews go public Available now

Hidden or unapproved reviews never leave the server.

☐ Want ☐ Maybe ☐ Don't need

2. Back end

What your staff use: a private, sign-in staff app with roles (Owner, Operations Manager, Field Crew, Front Desk).

Whole section
☐ Want ☐ Maybe ☐ Don't need

Inputs

What your team enters.

All in inputs ☐ Want ☐ Maybe ☐ Don't need

Customers (CRM) Available now

Add, edit, search and archive customers. Duplicate phone/email is caught. Entered by: Staff.

☐ Want ☐ Maybe ☐ Don't need

Quote builder Available now

Line items with quantity and price, totals computed, status workflow and change history. Entered by: Staff.

☐ Want ☐ Maybe ☐ Don't need

Invoices Available now

Create from a quote or from scratch, due dates, edit while unpaid, void when needed. Entered by: Staff.

☐ Want ☐ Maybe ☐ Don't need

Calendar and scheduling Available now

Week calendar of jobs, add on a day, double-booking blocked. Crew see only their own jobs. Entered by: Staff.

☐ Want ☐ Maybe ☐ Don't need

Dispatch Available now

Assign, reschedule and reassign crews; attach field photos stored privately. Entered by: Office / crew.

☐ Want ☐ Maybe ☐ Don't need

Field checklists (mobile) Beta

Per-job checklists with photos and sign-off showing who and when. Offline mode still to come. Entered by: Field crew.

☐ Want ☐ Maybe ☐ Don't need

Inventory / equipment Available now

Owned, out and in-shop counts with available stock calculated for you. Entered by: Staff.

☐ Want ☐ Maybe ☐ Don't need

Import your existing data Beta

Drop in spreadsheets, PDFs or Word files, or a shared-sheet link, to bring in customers, quotes and invoices. Entered by: Staff.

☐ Want ☐ Maybe ☐ Don't need

AI document reader Beta

Upload a contract or bid; AI pulls out totals and flags risks, then converts it to an invoice. Entered by: Staff.

☐ Want ☐ Maybe ☐ Don't need

Hiring pipeline Available now

Move applicants through Review, Interview, Offer, Hired; hire straight into your team. Entered by: Owner / manager.

☐ Want ☐ Maybe ☐ Don't need

Team and access Available now

Invite staff by email, set roles, remove access. Owner only, every change logged. Entered by: Owner.

☐ Want ☐ Maybe ☐ Don't need

Business settings Available now

Phone, hours, alert email, review link, referral offer and testimonials, changed any time. Entered by: Owner.

☐ Want ☐ Maybe ☐ Don't need

Outputs

What comes out of the system.

All in outputs
☐ Want ☐ Maybe ☐ Don't need

Quote PDFs and approval links Available now

Download a quote PDF or copy a private approval link to send.

☐ Want ☐ Maybe ☐ Don't need

Invoice PDFs and emailed invoices Available now

Send and resend invoices; status only says Sent when the email really went out.

☐ Want ☐ Maybe ☐ Don't need

Text and email follow-ups Available now

Reusable templates with real delivery status.

☐ Want ☐ Maybe ☐ Don't need

Review and referral requests Available now

Ask happy customers for a review with your link; track one-time referral rewards.

☐ Want ☐ Maybe ☐ Don't need

Dashboard Available now

Open quotes, money outstanding, active crews, jobs today, new notifications.

☐ Want ☐ Maybe ☐ Don't need

Reports Available now

Collected, outstanding, pipeline, win rate, jobs and crew utilization from your real records.

☐ Want ☐ Maybe ☐ Don't need

Spreadsheet (CSV) exports Available now

Quotes, invoices, customers, jobs, inventory and activity, ready for your accountant.

☐ Want ☐ Maybe ☐ Don't need

Calendar feed for your phone Available now

Private read-only feed of jobs for your phone or desktop calendar.

☐ Want ☐ Maybe ☐ Don't need

Direct accounting software sync Coming soon

Push invoices and customers straight into your accounting software.

☐ Want ☐ Maybe ☐ Don't need

Two-way calendar sync Coming soon

Changes in your phone calendar flow back into the system.

☐ Want ☐ Maybe ☐ Don't need

Staff text alerts Coming soon

Get a text, not just an email, when a new request or payment comes in.

☐ Want ☐ Maybe ☐ Don't need

Records

What's stored, and where. Each business has its own private data, backed up nightly.

All in records

☐ Want ☐ Maybe ☐ Don't need

Customer records Available now

Each customer with their linked quotes, invoices, jobs and documents.

☐ Want ☐ Maybe ☐ Don't need

Jobs and field photos Available now

Every job with schedule, crew and photos in private storage.

☐ Want ☐ Maybe ☐ Don't need

Customer documents Available now

Uploaded files per customer, with who uploaded them and when, and whether the customer can see them.

☐ Want ☐ Maybe ☐ Don't need

Quote and invoice history Available now

Who changed what and when on every quote and invoice.

☐ Want ☐ Maybe ☐ Don't need

Activity log Available now

Every staff and website action: who, role, what, when. Owners and managers can search it.

☐ Want ☐ Maybe ☐ Don't need

Company knowledge base Beta

Your uploaded files indexed so the AI coach can answer from them with citations.

☐ Want ☐ Maybe ☐ Don't need

Applicants, team and training progress Available now

Applicant answers, staff roles and each person's training progress.

☐ Want ☐ Maybe ☐ Don't need

Automation

What runs on its own.

All in automation

☐ Want ☐ Maybe ☐ Don't need

Lead finder Available now

Pulls new leads from real public sources for your industry and area, refreshed through the day, each with its source link. Never invented contacts.

☐ Want ☐ Maybe ☐ Don't need

AI coach for staff Available now

Staff ask questions and get answers from your own files with citations; it says when it doesn't know.

☐ Want ☐ Maybe ☐ Don't need

Notifications Available now

In-app feed per person plus email alerts for new requests, responses and payments.

☐ Want ☐ Maybe ☐ Don't need

Overdue invoice flags Available now

Invoices past due are flagged automatically.

☐ Want ☐ Maybe ☐ Don't need

Quote → follow-up → invoice flow Available now

A website quote logs a follow-up; an approved quote converts to a draft invoice in one click.

☐ Want ☐ Maybe ☐ Don't need

Nightly backups and uptime monitoring Available now

Database backed up every night; your site is checked every 5 minutes.

☐ Want ☐ Maybe ☐ Don't need

Training videos and AI lesson drafts Beta

Videos teaching your team the system, plus AI-drafted lessons you review before publishing.

☐ Want ☐ Maybe ☐ Don't need

Scheduled multi-step follow-up sequences Coming soon

Automatic follow-ups on day 1, 3 and 7 until the customer replies.

☐ Want ☐ Maybe ☐ Don't need

3. Other features we can build

Not built yet. Ideas from across industries; tell us which matter and we'll scope them.

Whole section

☐ Want ☐ Maybe ☐ Don't need

For your customers

All in for your customers

☐ Want ☐ Maybe ☐ Don't need

Online booking with time slots Custom build

Customers pick an open time and book themselves.

☐ Want ☐ Maybe ☐ Don't need

Memberships and recurring billing Custom build
Monthly plans, service contracts and auto-renewals.
☐ Want ☐ Maybe ☐ Don't need

Customer messaging portal Custom build
Two-way messages with customers inside their account.
☐ Want ☐ Maybe ☐ Don't need

Appointment reminders Custom build
Automatic reminders before a scheduled visit.
☐ Want ☐ Maybe ☐ Don't need

Intake forms and waivers Custom build
Custom forms and signed waivers before a job or visit.
☐ Want ☐ Maybe ☐ Don't need

Online store Custom build
Sell products or parts online.
☐ Want ☐ Maybe ☐ Don't need

Loyalty points and gift cards Custom build
Reward repeat customers.
☐ Want ☐ Maybe ☐ Don't need

For your operations

All in for your operations
☐ Want ☐ Maybe ☐ Don't need

Live crew location Custom build
See where crews are in real time.
☐ Want ☐ Maybe ☐ Don't need

Route planning Custom build
Best order of stops for the day.
☐ Want ☐ Maybe ☐ Don't need

Timesheets and payroll export Custom build
Clock in/out on the job and export hours.
☐ Want ☐ Maybe ☐ Don't need

Fleet and equipment maintenance Custom build
Service schedules, inspections and repair history.
☐ Want ☐ Maybe ☐ Don't need

Purchase orders and vendors Custom build
Order supplies and track vendor bills.
☐ Want ☐ Maybe ☐ Don't need

Permits, certifications and compliance tracking Custom build
Expiry reminders for licenses, insurance and certifications.
☐ Want ☐ Maybe ☐ Don't need

Safety and incident reports Custom build
Field incident forms with photos and sign-off.
☐ Want ☐ Maybe ☐ Don't need

Rental contracts with check-out/in photos Custom build
Condition photos and damage notes on each rental.
☐ Want ☐ Maybe ☐ Don't need

Multiple locations Custom build ☐ Want ☐ Maybe ☐ Don't need

Separate branches under one owner view.

For growth and insight

All in for growth and insight ☐ Want ☐ Maybe ☐ Don't need

Email newsletters Custom build ☐ Want ☐ Maybe ☐ Don't need

Send updates and offers to opted-in customers.

Social media posting Custom build ☐ Want ☐ Maybe ☐ Don't need

Plan and post updates from one place.

Advanced dashboards Custom build ☐ Want ☐ Maybe ☐ Don't need

Custom charts and goals for owners.

Connect to software you already use Custom build ☐ Want ☐ Maybe ☐ Don't need

Custom connections to your existing tools.

Something else Custom build ☐ Want ☐ Maybe ☐ Don't need

Tell us in the notes box.

Send your checklist

0 items marked. We'll reply with a plan and price for what you picked.

Name *

Company

Email *

Phone

Notes (anything else you need)