

# Toolie

## Features & User Guide

The all-in-one job, quoting, money and compliance app  
built for New Zealand residential builders.

Made in Aotearoa New Zealand | [toolie.co.nz](https://toolie.co.nz) | Edition May 2026

# 1. What is Toolie?

Toolie is an all-in-one business app built specifically for New Zealand residential builders and tradespeople. It runs **offline-first** (works on site with no signal), syncs to the cloud, and ships as web, iOS and Android apps. Unlike generic trade apps, Toolie is built around the NZ Building Code: NZS 3604, H1 energy efficiency, Healthy Homes and the Construction Contracts Act 2002 are baked in, alongside an NZ quantity-surveyor pricebook and region-by-region pricing.

This guide covers every feature and gives step-by-step instructions for each part of the app.

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## Who it's for

- Sole-trader builders and subbies
- Small to mid-size building crews (2–20)
- Renovation, new-build, decks/fences, light commercial fit-out
- Anyone who needs NZ-code-correct quoting and compliance without a spreadsheet

## 2. Full feature list

### Quoting & Estimating

- Instant priced quotes for 16+ job types (deck, fence, sleepout, garage, granny flat, retaining wall, slab, cladding, roofing, fit-out, new build, extensions, bathroom/kitchen reno)
- Built-in NZ QS pricebook with real local SKUs and pricing
- Automatic NZS 3604 materials take-off (piles, footings, bearer/joist spans, fixings, bracing)
- Quote accuracy auditor and competitor quote analyser
- Recipes/templates and branded PDF quotes carrying your LBP number

### PDF Takeoff & Plans

- Measure lengths and areas straight off PDF plans into a quote
- Plan revision tracking, floor/site plan generation
- Import external QS / BOQ schedules

### Job Management

- Full lifecycle: enquiry → quote → job → handover, with customer database and lead pipeline
- Per-job: variations, selections, site diary, punch list, RFIs, photos, warranty, plant hours, consent, EOT, notes
- Photo timeline & annotator; variation builder with client approval

### Scheduling & Programme

- Realistic 12-phase NZ build programme with auto-crew scheduling
- Gantt, dispatch board, calendar gap finder, open-shifts board
- Weather-aware programme with one-tap client reschedule

### Invoicing, Money & Cashflow

- Progress-claim invoicing with correct 15% GST
- 13-week cashflow forecast; profitability dashboard per job
- CCA 2002 retention ledger with automatic release-date calculation
- GST return summary, WIP/conversion reports, bills & receipts libraries

### Materials & Suppliers

- Just-in-time staged delivery — BOM split into phase-timed delivery drops
- Purchase orders and supplier ordering
- Estimate-vs-actual material calibration

### Team, Crew & Subbies

- Crew portal: time, schedule, time-off, open shifts
- Timesheets feeding job profitability
- Subbie management and competency tracking

### Health & Safety

- SWMS, hazard register, hazardous-substances register
- Toolbox talks, permits to work, incident reporting, visitor sign-in
- Guided safety setup wizard

## **Compliance & Inspections**

- Consent intelligence (Schedule 1 exemptions / Restricted Building Work)
- Inspection scheduling around council booking points
- LBP tracking; written-contract threshold and NZS 3902 prompts; maintenance module

## **Client Portal & Comms**

- Branded client portal: live status, milestones, quote & variation approval
- Customer comms log, follow-up drafts, shareable links

## **NZ-Specific Intelligence**

- Address → wind zone, coastal/corrosion, seismic and H1 climate zone
- NZS 3604 engine; H1 6th-edition R-values; Healthy Homes guidance
- Region-aware pricing for ~30 NZ locations; NZ weather-aware scheduling; NZ reference library

## **Integrations & Platform**

- Xero invoice/bill sync with payment status return
- Generic event webhook (Make/Zapier/custom)
- Native iOS & Android + installable PWA; offline-first

## 3. Step-by-step instructions

### Create a quote (with NZS 3604 take-off)

- 1 Go to **Quoting** → **Quote Builder** and pick the job type (e.g. Deck Build, New Build).
- 2 Enter the site address — Toolie auto-detects wind zone, coastal exposure, seismic and H1 climate zone.
- 3 Enter dimensions/scope. Toolie runs the NZS 3604 take-off (piles, spans, fixings, bracing) and prices it off the NZ pricebook with regional uplift.
- 4 Review the **Quote Accuracy** panel — it flags missing companion lines, supply-only items with no labour, and underquoting.
- 5 Adjust margin/contingency, then export the branded PDF (your LBP number is included) or send via the client portal.

### Measure off a PDF plan

- 1 Open **Quoting** → **PDF Takeoff** and upload the plan PDF.
- 2 Set the scale by drawing a line of known length.
- 3 Click to measure lengths and areas; quantities feed straight into the quote.
- 4 Use revision tracking to keep plan versions aligned with the quote.

### Run a job

- 1 Convert a won quote to a job, or create one from **Jobs** → **New job**.
- 2 Use the job tabs for variations, site diary, photos, RFIs, punch list and consent tracking.
- 3 Raise variations in the variation builder; send for client approval; approved variations roll into the contract total.

### Schedule the programme & crew

- 1 Open the job's **Schedule** tab — Toolie drafts a 12-phase NZ programme with realistic durations.
- 2 Auto-schedule crew (respects days off, phase order, cure waits, inspection points).
- 3 Weather-sensitive and pour days are flagged from the live 14-day forecast; reschedule with one tap and notify the client by SMS.

### Invoice, GST, cashflow & retentions

- 1 Raise progress claims from **Money** → **Invoices** — GST (15%) is handled correctly.
- 2 Check **Cashflow Forecast** for the 13-week projected position (money in vs bills out, opening balance, shortfall warnings).
- 3 The **Retention Ledger** tracks retention withheld per claim and auto-calculates the release date from Practical Completion + defect period (CCA 2002).
- 4 Connect Xero in Settings to push invoices/bills automatically.

### Stage material deliveries (just-in-time)

- 1 Open a job's **Materials** tab.
- 2 Switch the delivery toggle to **Staged (just-in-time)**.
- 3 Toolie groups the BOM into phase-timed delivery drops, each with a suggested deliver-by date (phase start minus a buffer).
- 4 Order each drop from the supplier near its date so stock isn't sitting on site getting damaged or tying up cash.

## Crew portal & timesheets

- 1 Invite crew in **Team** → **Crew**; they get the crew portal.
- 2 Crew log time, view their schedule and weather flags, request time off and pick up open shifts.
- 3 Timesheets flow into job profitability automatically.

## Health & safety

- 1 Run the **Safety Setup Wizard** once to stand up a compliant system.
- 2 Maintain the hazard register, run toolbox talks, issue permits to work, and log incidents and visitors from the H&S hub.

## Compliance & inspections

- 1 Toolie tells you whether work is Schedule 1 exempt, needs consent, or is Restricted Building Work, with the clause cited.
- 2 Schedule inspections around council booking points (pre-pour, pre-line, pre-cladding, final).
- 3 Your LBP number flows onto quotes, invoices and Records of Work.

## Settings, Xero & integrations

- 1 In **Settings** → **Integrations**, paste your Xero bridge URL/token and click Connect Xero.
- 2 Optionally set a generic event webhook for quote/job/invoice events.
- 3 Set business details, branding and LBP number here — they flow onto all documents.

## Mobile & offline

- 1 Install the iOS/Android app or add the PWA to your home screen.
- 2 Everything works offline on site; data syncs when signal returns.
- 3 Use the native camera, GPS and share sheet directly from jobs.

## 4. NZ compliance reference

How Toolie helps you meet each obligation. This is a working aid, not legal advice — always confirm against the current standard and your council.

### **NZS 3604 (Timber-framed buildings)**

Toolie's take-off engine sizes piles and footings, bearer and joist spans, fixings, bracing and connectors to NZS 3604 and cites the clause, so quoted quantities are code-correct from the start.

### **H1 (Energy efficiency — 6th edition)**

R-values are applied by H1 climate zone (1–6) for roof, walls, slab and glazing, using the current 6th-edition figures, derived automatically from the site address.

### **Healthy Homes Standards**

For rentals, Toolie surfaces the heating, insulation (zone R-values), ventilation, moisture and draught-stopping requirements with compliance deadlines and penalty amounts in context.

### **Construction Contracts Act 2002**

Progress-claim workflow and the retention ledger track retentions withheld per claim and calculate the release date from Practical Completion plus the defect-liability period. Toolie also prompts the mandatory written-contract threshold (\$30,000 incl GST) and NZS 3902 requirements.

## 5. Pricing

All prices NZD, ex-GST. 14-day free trial, no credit card. Pay annually and get 2 months free. No lock-in — cancel anytime.

Plan	Monthly	Best for
Solo	\$49	Sole-trader builder: quote, comply, get paid (1 user, 20 jobs/mo)
Crew	\$129	Whole crew, fully NZ-code compliant (up to 8 users, unlimited jobs)
Builder Pro	\$249	Estimating power + compliance (up to 20 users)
Enterprise	Custom	20+ users, multi-entity, onboarding & SLA

Pricing shown is current as at May 2026 and subject to change. Visit [toolie.co.nz](https://toolie.co.nz) for the latest.

**Toolie — built for the NZ Building Code, not bolted on.**