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QuickBase
Solution Provider

Using Cloud-Based Technologies to Rapidly Scale your Growing Business

Presentation to Associated Builders and Contractors, Inc.



RAYCO 

Rayco provides painting and sustainable construction services, including solar energy systems, to commercial and residential customers.



RaycoEnergy

- **10 times faster to enter new jobs for existing customers, improving productivity and morale, and 25% time savings for entering and tracking data overall**
- **15% increase in profits for commercial customers from 2013 to 2014**
- **Customer service feedback has improved, with 98% of customers reporting “Excellent” customer service, compared to 75% in 2013**

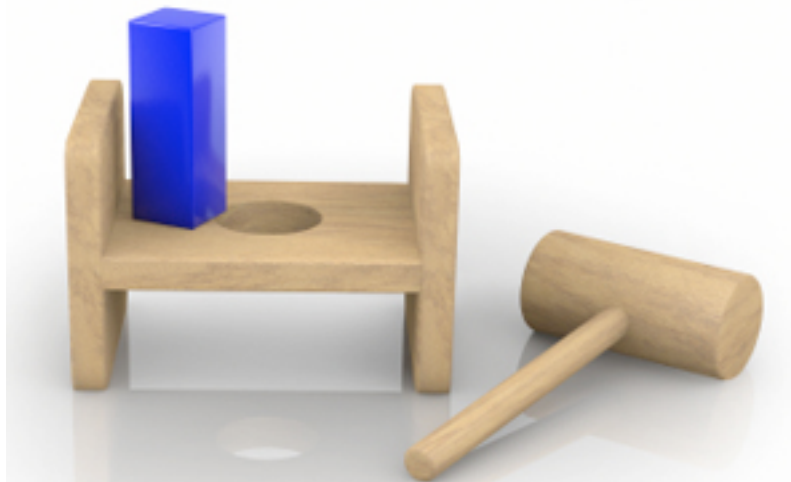
Choosing Cloud-Based Tools



- Why a cloud-based system? Why QuickBase?

intuit. QuickBase

- Why CloudBase Services?



Challenge #1

- **Lots of different systems**
- **Too many QuickBase applications**

*Our project entry form was **really** long...*



#1 Scrolling down...

#2

#3

#4

#5

#6

Color Samples/Matches

IMGUR Link

Sub-Contractors

Additional Labor (person being paid) Additional labor cost:

Description of additional Mgt. Costs Additional Management Costs

Total Labor Cost

400

Labor Percentage

16.6%

Total Job Costs

\$400.00

Total Job Cost Percentage

16.6%

Profit Tier

Tier 6

Job Profit

\$2005.00

Profit Margin

83.4%

Labor Tier

Tier 6

Labor Bonus Amount

\$100

☐ Labor bonus paid

Sales Person Getting Commission

Ricky Chu

Residential Sales Commission Amount

\$144.30

Commercial Sales Commission Amount

\$96.20

Sales Commission Actual

☐ Sales Commission Paid

Sales Profit Tier

Tier 6

And there's still more below!

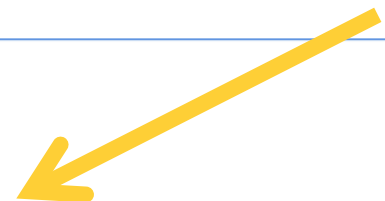
Customer Service Follow up

☐ Follow-up

☐ Warranty Packet Sent

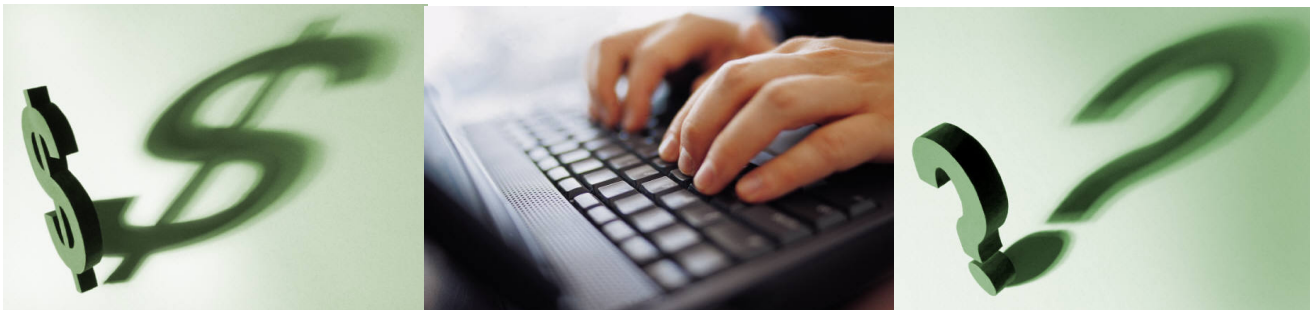
☐ Warranty info Delivered

Final Quality of Project



Challenge #2

- **Inability to track revenue and profit**
- **Missing revenue opportunities**



Challenge #3

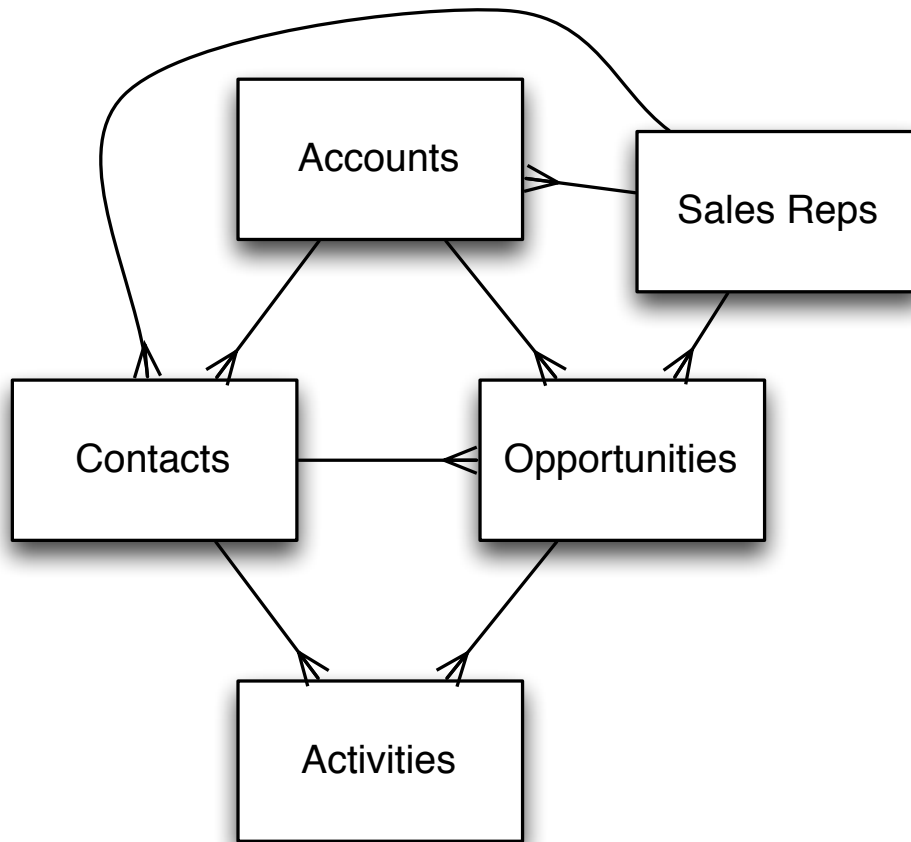
Back office costs were too high



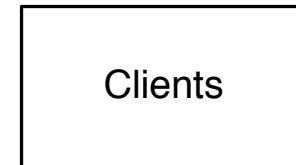
Rayco Sales Tracker Diagram - Before



App #1: 2013 Commercial Sales Tracker

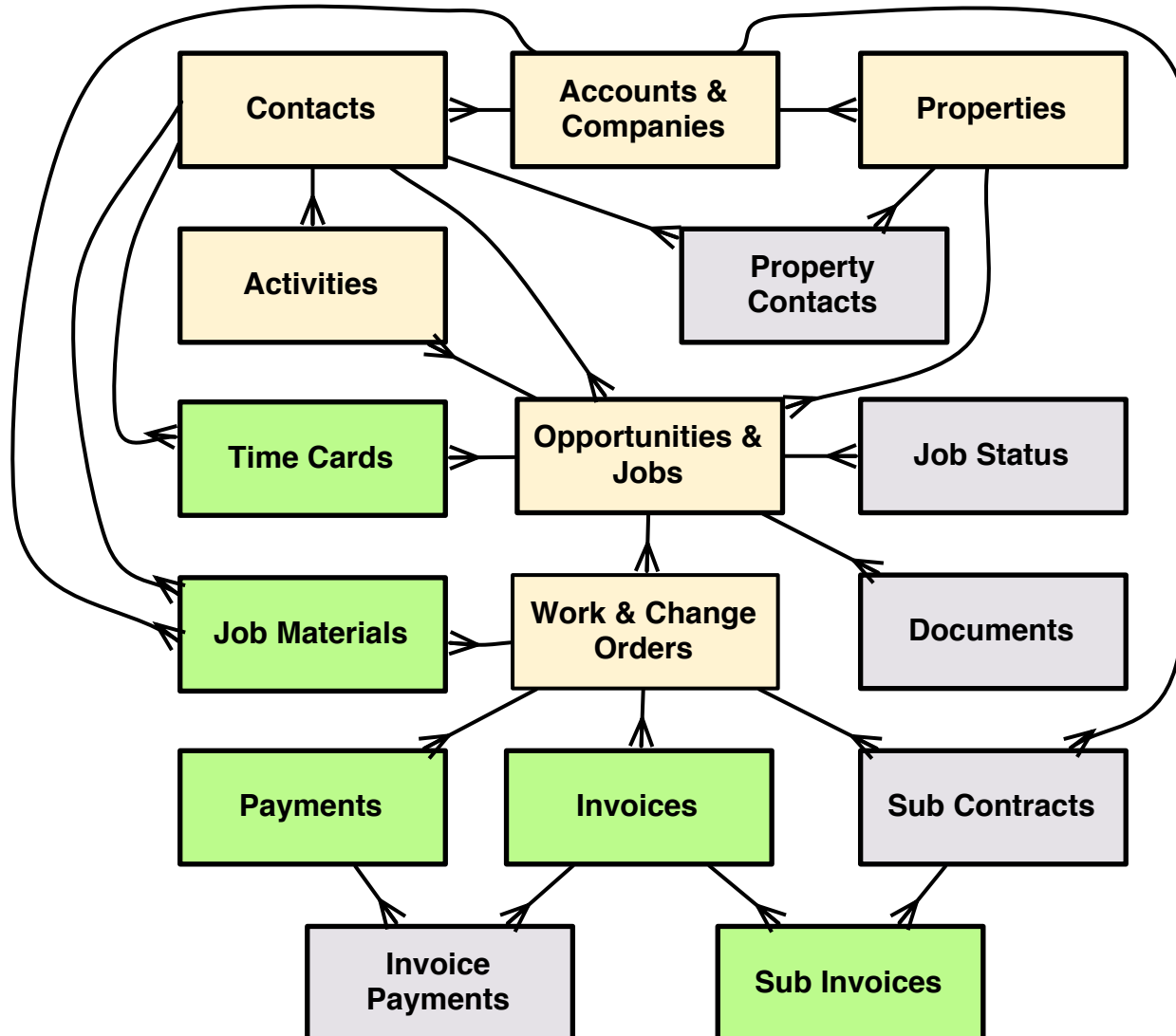


App #2: Rayco 2013 (Includes all Commercial and Residential Jobs)



- **What systems do you currently use?**
- **What are your pain points?**
- **Who will use the new app and how will they use it?**

Rayco Sales Tracker Diagram - Current



Legend:

Job Costs & Profitability Tables

Main Data Entry Tables

"Support" Tables

Solution



RAYCO

My Apps Demo Copy of Rayco Sales Tracker Rayco Sales Tracker New App

Home Users Development Items Activities Accounts & Companies Contacts Properties Opportunities & Jobs Work & Change Orders Invoices Payments

Work & Change Orders A+ Properties SAMPLE Commercial Account-Sierra Crest SAMPLE-14C-3757 - 3757 W1

SETTINGS REPORTS & CHARTS

Work Order information

Property Name	Opportunity/Job Name	Property Address			
Sierra Crest SAMPLE	A+ Properties SAMPLE Commercial Account-Sierra Crest SAMPLE-14C-3757	610 Coffee Lane San Jose, CA			
Property Main Contact	Property Main Contact - Cell Phone	Property Main Contact - Office Phone	Property Main Contact - Email		
Janet SAMPLE	(999) 999-9999	(408) 555-5555			
Account Main Contact	Account Main Contact - Cell Phone	Account Main Contact - Office/Other Phone	Account Main Contact - Email	WO/CO Number	Sales Rep
				3757 W1	Gabe SAMPLE
Opportunity/Job Status					
14 - Booked - In Progress					
Update Job Status					

Sale Information

Estimator Notes

Opportunity/Job Booked Date	WO/ CO Date	WO/CO Amount
03-10-2014		\$224,325.64
Work Order/ Change Order	Type of Service	
Work Order	Construction	
Warranty Type	Trim	# of Stories
Scope Summary		

*Live QuickBase Demo of
Rayco Sales Tracker
(See Recorded Webinar)*

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- TurboTax
- QuickBooks
- Quicken
- QuickBase

Need help implementing?

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CloudBase Services

- Customize a QuickBase solution just for you

Available Services



- System design
- Training
- Google charts
- Analytics & data visualization
- Systems integration
- Custom tools like Time Cards and Resource Allocation



Stay in touch



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