

RAISING THE ROOF BUSINESS WITH SALESFORCE



Challenge

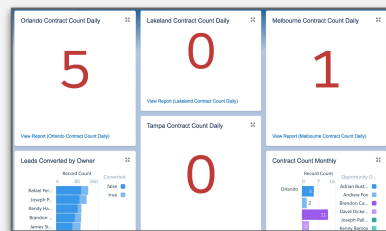
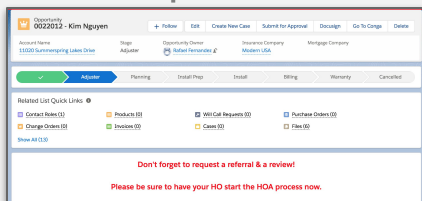
- Duplicate work from disconnected systems
- Using Excel, FileTrac™ and NetSuite
- Expensive NetSuite licenses required for all users to view balances & transactions
- No workflow engine for task assignment
- Difficulty recording, sorting & viewing notes
- Lack of security, high turn over, no way to control contact and lead list info
- No management visibility into lead cycles
- Not capturing or tracking leads
- Inefficient, manual contract process
- No in-field connectivity

Solution

- Automated lead assignment, tracking & approvals
- Integration with NetSuite Suite Cloud accounting system automates SOW, PO, will-call order, documentation and approval workflow
- Cases for warranty claims provides ability to mass void warranties based on region (i.e. recent storm)
- Tasks/automation/flows and reminders to assure on-time projects
- Mobile enablement for field account managers with Salesforce 1 via iPads
- DocuSign to streamline contract process

Result

- Enhanced security for leads and optys
- Full executive visibility into lead management, approvals and controls
- Reduction in cost of NetSuite licenses
- Real-time metrics and dashboards enable better business planning and decision making
- Sales teams have quicker access to key business metrics through advanced analytics and mobile capabilities
- On-the-go access to orders, invoices and journal entries
- Contract approval time reduced
- Increased efficiency for key activities like inspection status updates



Jasper Contractors

Industry

Construction, Roofing

Profile

Jasper Contractors, Inc. is a national roofing contracting company with offices located in Atlanta, Georgia, Evansville, Indiana, Jacksonville, Florida, Orlando, Florida, and Tampa, Florida.

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70 Enterprise

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