RAISING THE ROOF BUSINESS WITH SALESFORCE



er Contractors

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er Contractors, Inc. is a national g contracting company with offices ed in Atlanta, Georgia, Evansville, na, Jacksonville, Florida, Orlando, la, and Tampa, Florida.

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DETAILS ACTIVITY C	HAFTER	FEED	Enail Home Owner
Coperturity Name BC022012 - Kim Nguyen		Opportunity Dwner 😸 Rafael Fernanciez	Searchitest Socializies
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Kone Gener Kim Nguyen		Navar. Otlando	
toneOwerbeal s.Xim_ban@yiheccom		Jore Zone 4	Log a Call New Task New Trent More
Prone # 407-733-9981		Depusit.Annualt 56:00	Resp your cel.
Inuuros Conpeny Modem USA		Replacement Shingle NDC Calleridge - Delfherood (ARCHITECTURAL)	Activity Timeline Y C Expendial
Hulos Number ATH1061538		Replacement Drip Edge "Drip Edge - White 6"	Next Steps
Cuin Nunder AH113830		Upgrade Type	Adjuster meeting Temorow
Metgage Company		Uppade Rate	Past Activity



Challenge	Solution	Result	Jasper
 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 	 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 	 Enhanced security for leads and opptys 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 	Industry Constru Profile Jasper roofing located Indiana Florida, License 70 Ente Produc

