



GC dataBay, Inc. offers a very unique and affordable solution, CoreOffice for Contractors & Builders, which helps you grow and prosper by empowering you with tools overcome the daily challenges you face as a professional contractor. **Built-in Work Flow Automation transfers files to the right person or department at the right time and prompts you to your next step.**

CoreOffice is a one of a kind solution great for single or multi-locations, single or multi-trade, residential or commercial accounts, General Contractors, Specialty Trade Contractors, Custom Builder, or Turnkey Builder.

With CoreOffice 9.2, schedule an appointment and generate a detailed proposal/estimate at the same time you create a budget. Budgets are fast and simple to build by selecting material and labor codes which pull in automatically so that all you're left to do is enter quantities. When the job sells, use the budget distribution center to automatically generate your work orders, invoices, materials purchase orders, & labor pay tickets. Work-in- progress job costing with budget vs. actual expenses is automatic.

You can be proactive in winning bids, rather than reactive to servicing the accounts you already have. CoreOffice will improve your lifestyle by enabling you to concentrate on your trade vs. the administration of your business. The benefits are exponential and far reaching.

- Improve communication with employees, subs, vendors, and business associates.
- Offer outstanding service to your clients and prospect.
- Free up valuable time!

All the features below show functionality integrated into the Main Application. As you can see, you receive numerous benefits from the basic package. For clients who want to integrate more functionality, discover the three additional levels of service available from GC dataBay, Inc.

### **CoreOffice™ Main Application**

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- Security Levels & Passwords
- CRM – Lead and Contact Manager
- To-Do List Manager
- Scheduler and Dispatch Manager
- Map and Directions Generator
- Sales & PR Level Work Order Manager
- Workforce Level Work Order Manager
- Follow-Up Tools For Sales Reps – Managing Pipelines Of Any Size Easily
- Estimator Activity Report (Sales Goals & Projection Manager)
- Sales Reports
- Sales Commission & Sales Draw Manager
- Customer Job Folder Manager
- PowerBudget!
- Budget Manager
- Built-In Estimates
- Point & Click Job Costing
- Job Cost Analyzer (Expense Budget Analysis)
- Automated Billing
- Invoice Manager w/ or w/o Insurance or Retainage
- Itemized Invoice
- Customer Payment Manager
- Profit & Loss - Fixed Costs, Commissions, Materials and Labor
- Subcontractor's Certificate of Insurance Expiration Notification
- WorkCenter Activity Center
- Materials Purchase Order Manager
- Post Job Inspection Manager
- Credit Manager
- Accounts Payable Reports
- Accounts Receivables Reports
- Automated Labor Payroll
- Vendor Manager
- Trade Defaults For Forms
- Insurance Proceeds Manager
- Customer History Manager
- Automated Warranty Manager
- GC Bid Manager
- Reference Manager
- Letter Writer With Pre-Sale Marketing & Post-Sale Correspondence
- File Handlers
- Job Folder Timeline
- Job Status Report
- Plus More!



## Premium Modules Package Plan

The Premium Modules Package is a must have for contractors of all sizes. Access all Premium Modules listed below a low monthly fee per office. Premium modules listed below are integrated with the CoreOffice Main Application. Therefore, to access Premium Modules, you will also need to subscribe to the CoreOffice Main Application.

### Stored Budget & Turnkey Module

With CoreOffice 9.2, schedule an appointment and generate a detailed proposal/estimate at the same time you create a budget. Budgets are fast and simple to build by selecting material and labor codes which pull in automatically so that all you're left to do is enter quantities. When the job sells, use the budget distribution center to automatically generate your work orders, invoices, materials purchase orders, & labor pay tickets. Work-in-progress job costing with budget vs. actual expenses is automatic.

You can also utilize our new stored budget and turnkey module (templates defined by you) to save your budgets as templates to be applied to a job on the fly. Edit stored plans as needed. A must have for turnkey contractors to manage unlimited turnkey plans with linked options for commercial or turnkey clients.

### General Ledger

The CoreOffice GL integrates with the CoreOffice main application to allow efficient management of one or more checking accounts. As you pay vendor statements using the PO Manager, or sales commissions using the Commissions Manager, and even Labor Payroll each week, your internal transactions are exported to the GL where you generate checks and reports for the transactions. Each GL managed account contains color-coded checkbook views, which automatically finds and displays just those transaction types when visited. These views consist of Purchase Order expenses, Labor expenses, Sales Commissions Expenses, Other Miscellaneous Expenses, Fees / Withdrawals / Transfers, and Deposits. Easily change checkbook views by clicking the color code button at the bottom of any view.

Easily setup as many checking or bankcard accounts necessary to accommodate your business, as well as transfer funds between accounts or lines of credits. CoreOffice GL supports recurring transactions for Fees, EFT or Drafts. Also, you can pre-write checks and schedule for payment. The Bill Reminder notifies you each day of un-finalized bills requiring payment.

The GL also allows for consolidation perfect for customers with multiple locations and separate datasets who prefer to manage all expenses and revenue data entry from the main office. Easily log on through web extensions to pay bills and receive customer payments from other offices. Data from remote offices is easily imported into the consolidated GL at the main office. One-click reports include location field in your searches to generate dynamic reports that span single or multiple locations. W2 Payroll module subscribers also enjoy the same reporting ease as it integrates with the consolidated GL enabling the main office to handle employee payroll for multiple locations.

The CoreOffice GL comes with a multitude of one click reports as well as easy to use Report Builders to fine-tune searches. In addition, CoreOffice GL offers a Balance Forecast Report which automatically summarizes the account status taking into consideration Current Balance, UnDeposited Fund, UnFinalized Expenses, etc to give you a true cash amount less upcoming expenses and undeposited revenue. If you also utilize the W2 Payroll Module, this report takes into consideration Pre and Post Tax Withholdings, Unpaid Tax Withholdings, and Employer Fed & State UnEmployment Tax.

### Credit Card Manager

Manage your credit cards! Use the credit card manager to import and apply your expenses from the PO manager using one or more credit cards. Build instant summary reports from the transactions showing in the Credit Card Ledger. Just click and choose a report. Sort your credit card transactions in the credit card ledger by click on column headings.

### LeadBay

Track leads in LeadBay. Import lead lists. LeadBay contains customizable letters & customizable fields as well as envelop & labels. Once a lead opts to meet for an estimate, simply click the Add to Main App button and a new job folder will be added in the Main Application without any additional typing!

### Estimate Writer Deluxe

If you already use CoreOffice, you know just how convenient it is to be able to enter and track multiple estimates for each work order and job folder you set up. The estimate panel provides the flexibility of entering a minimum amount of estimate data, or you can jump to one of three internal estimate styles or user the Estimate Writer Deluxe to prepare an estimate line item proposal. With the addition of Estimate Writer Deluxe, you'll now have the capability of switching to this plug-in and using a line itemized estimate form if you choose.



## Premium Modules Package Plan (continued)

### Schedule-Aide Plus

Toss out those pesky hard-to-keep-current whiteboards and appointment books! Eliminate the need to run down the hall to check your schedules. The schedule automatically self-adjusts as work orders are added and completed.

### Equipment Manager

Tracking your equipment has never been easier. Check-in, check-out and reserve your tools, vehicles and machinery for scheduled work orders. This module ties in with your current work orders for easy scheduling and management. This handy tool will enable you to manage your capital resources. Also, manages vehicle and equipment maintenance and services.

### Job Photo Manager

If you participate in a direct repair program with an insurance company or third-party management company - this module plugs right in and enhances CoreOffice even further! After you complete your property inspection, cut and paste your photos of the loss address right into this module for permanent or temporary storage. Photos can be found as easily as finding an address for your customer. Auto-arrange and even use the photos in reports that can be emailed right out of CoreOffice to the claims adjuster. This module can be used for before / after shots of work that can be quickly 'pulled-up' and shown to walk-in customers for references. Use CoreOffice powerful search features to select any group such as completed work orders for interior painting done in key map 450z - and show off your work to potential clients! Another key use: Have your sales reps take photos of repairs that they bid, and cut/paste the photos to the client's job folder. When the job is "ready to go", access the photo and print out with the work order for the assigned service rep, to help explain the work specifications. Prevent having to send your rep out again to complete the job and get it done right the first go round. There are many other uses for the photo manager, and just one additional way GC dataBay keeps you ahead of the competition!

### Vendor Price List Manager

Inventory Cataloging allows you to setup items you purchase and resell by unique line item code. For each item, input descriptive information, bin location, and assign to user definable categories. Price list management allows you to easily track and maintain pricing for each item for up to twenty vendors. Integrates with CoreOffice Purchase Ordering in Main Application and integrates with vendor setup module. When ordering job material from within CoreOffice for a specific work order / job - complete your purchase order using line item codes you've setup in the inventory catalog. CoreOffice fills in description and pricing based on the vendor you select to send your PO to. This can be one of twenty vendors managed in your price list, or from your own company inventory. Internal price check and comparison portal allows you to see per-vendor pricing for an individual item prior to ordering, and the comparison view will total each item for the quantity needed and display per-vendor pricing for the item, and a purchase order grand total, so that you make the best decision for your business before you submit the PO; saves you money all year long. Integrates with the PowerBudget module to allow for fast and accurate budgeting of any job prior to providing your client with an estimate for the work, or afterwards to complete budget-only PO's (material sheets) which sit in the Material Expenses Panel waiting to be used by the Production team when ready to start the work.

### Inventory On Hand Integration

Finally, this module contains great features to assist with inventory counts. Easily schedule inventory counts and print count tickets by category or bin location to divide the task among employees. Count tickets show each item, its location, and the amounts shown in the computer for physical inventory, TBS inventory, and the quantity that should be on the floor at the given time. The employee can then count and document the quantity on the ticket, or radio the count back to personnel who can enter the count into the system. Entering counts is as simple as clicking a button, selecting the counter's initials from a drop down menu, and entering the physical count. CoreOffice documents and date/time stamps the count calculates the accuracy by subtracting out what's currently sold and TBS. The system will score the count if perfect, and if the count is off, it will document the number down or up on that day, and automatically adjust the current inventory to the correct quantity. Furthermore, you have access to count data for reports that can be generated at anytime for one or all items and for any date range you select. Tracking your inventory will never be easier.