



# Richard Carlton Consulting

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## FILEMAKER SUCCESS STORY

### Mann & Associates Real Estate Appraisers & Consultants

Discovery Bay, CA

#### Mann & Associates Customer Story at a Glance

##### Challenge

- \* Database needed for core operations.
- \* Must retain files up to seven years.
- \* Needed efficient way to locate prepared files.

##### Solution

- \* Added appraisal module to database template.
- \* Incorporated SuperContainer
- \* Allow pictures and property descriptions to be inserted.

##### Benefit:

- \* Tracked contacts and clients
- \* Allowed employees to see all aspects of a property.

##### Products Used

- \* FM Pro 9
- \* Third party SC allowed for document storage.

##### Platform

- \* Mac OS X

With three offices located in the Bay Area and Central Valley of California, Mann & Associates has close access to seven large thriving cities. It is within this area, Mann & Associates has proven to be a leader in quality and high tech appraisals. They appraise residential, commercial and industrial properties, and have a unique specialty of church appraisals. Nearly twenty years ago, the company made a step forward to incorporate twenty-first century software. Since then, their continuance has allowed them to hold up their high standards.

Over time there was not an efficient way to find files that were prepared over the years; another need to step-up arose. Mann needed a database for the core operations; in addition, files must be retained between five to seven years. Mann's vision included the ability to add photos, a description of the property and allow employees to access the information. Other FileMaker developers were hired to build a database to fit their needs. For two years these developers failed to succeed resulting in frustration and wasted money. Karen Mann then contacted Richard Carlton Consulting.

RCC uses a FileMaker template called Business Commander as the foundation for all business solutions. Several modules on this database are given that most business need; for example, Mann was able to incorporate the calendar, schedule and basic invoice modules. To prove the suppleness of Business Commander, an appraisal module was added. This feature allows the company to add images of property with a description, keeping all employees on the same page.

Supporting the SuperContainer functionality, Business Commander allows employees to append pictures of a property. "Super Container is Dynamite," states Jonathan Ray, lead RCC FileMaker for Mann & Associates. "With Super Container, we can stick photos and movies of properties right inside FileMaker with zero performance penalty. It's really fast!"

As requested, all files are retained up to seven years. To find a particular file is easy. RCC worked inside the budget of Mann & Associates. Within three short months, and analysis phase, a database was built, detailed specifically to their needs, in which, Karen Mann rates her database to be "absolutely flawless." This greatly helps their emphasis to remain on prompt service.

