

ERIC CHAIKIN C/F USER GROUP CONFERENCE OCTOBER, 2022







A ROADMAP FOR MODERNIZATION





HI, MY NAME IS...

Eric Chaikin

• VP Strategic Development Component Assembly | CF Data Systems

Background

 Product vision & strategy, Building technical & UX teams, Enterprise financial systems, Web & mobile startups, Strong customer focus

Roles

- CAS: Technology strategy, STRUCTURE integration
- C/F: Product Development; Modernization roadmap

MISSION: Bridge to the future, respect the history





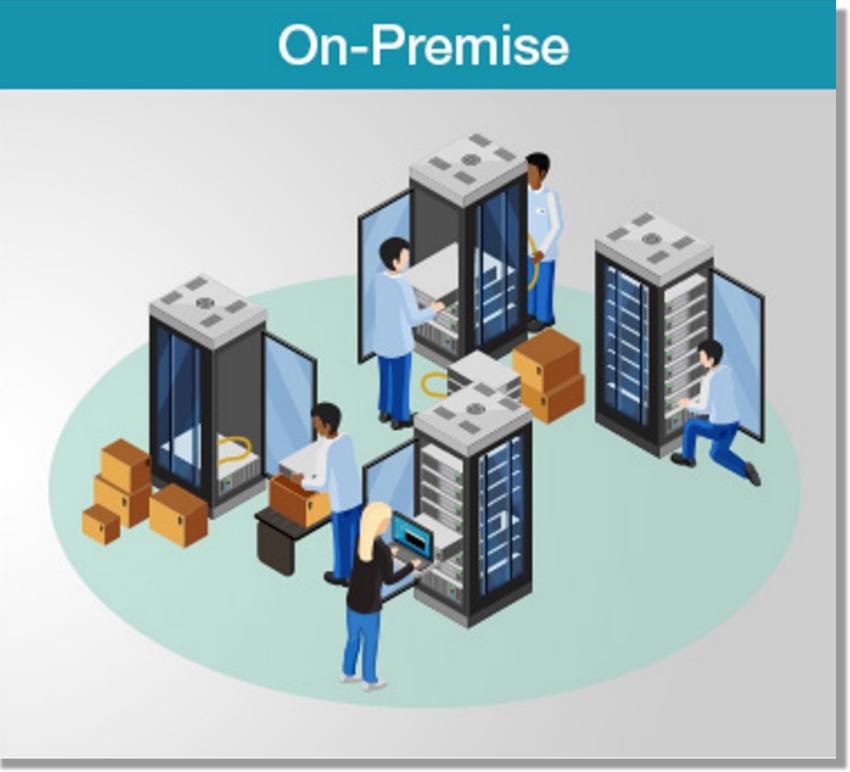
WHERE WE ARE

STRUCTURE: On-prem delivery

- Your hardware, your network, your IT
- You manage: backup, security, virus protection
- Mobile apps connect to your network
- No central monitoring; Integrations difficult
- 100s of sites high support burden

Software: "Veteran Workhorse"

- Desktop application, Windows look & feel
- Very functional 30 years of features
- Proprietary data file format ("Vision")







MARKET TRENDS

"Rise of the Platform Era" - McKinsey

Consolidation Aggregation Integration

2022 – 85% of contractors said Cloud was important to their business (2012: 12%)

SKATE WHERE THE PUCK IS GOING





Connect Contractor Enterprise to the Project





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WHERE WE'RE GOING

- Cloud delivery
- Saas Subscription model
- Modernized code & data access
- Best-of-breed look & feel
- Web & mobile design
- Platform for integration





The future will look exactly like this!

GOAL: BEST-IN-CLASS CUSTOMER SERVICE, FUNCTIONALITY, UX, CONNECTIVITY

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Multi-year effort to modernize **STRUCTURE**



Delivery will move from on-prem to cloud, powered by Microsoft Azure



Pricing transitions from software purchase to a SaaS subscription model

Will transform all areas of the system over time, in a phased approach







ROADMAP





Hosted STRUCTURE Microsoft Azure Virtual Desktop

Structure v18





WebApp Navigation Reports & Dashboards StructureSQL

2024+

PLANNING

STRUCTURE CLOUD 3

Native Web UX Mobile Redesign Open APIs

Structure v20

Structure v19

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APPROACH: MINIMIZE RISK

Three major phases allow parallel delivery of services as current customers migrate to STRUCTURECloud.

No "start-from-scratch" rewrite Specific components tested in each phase. Current business logic remains as long as possible.

Con: Takes longer **Pro**: Minimizes disruption to your business.



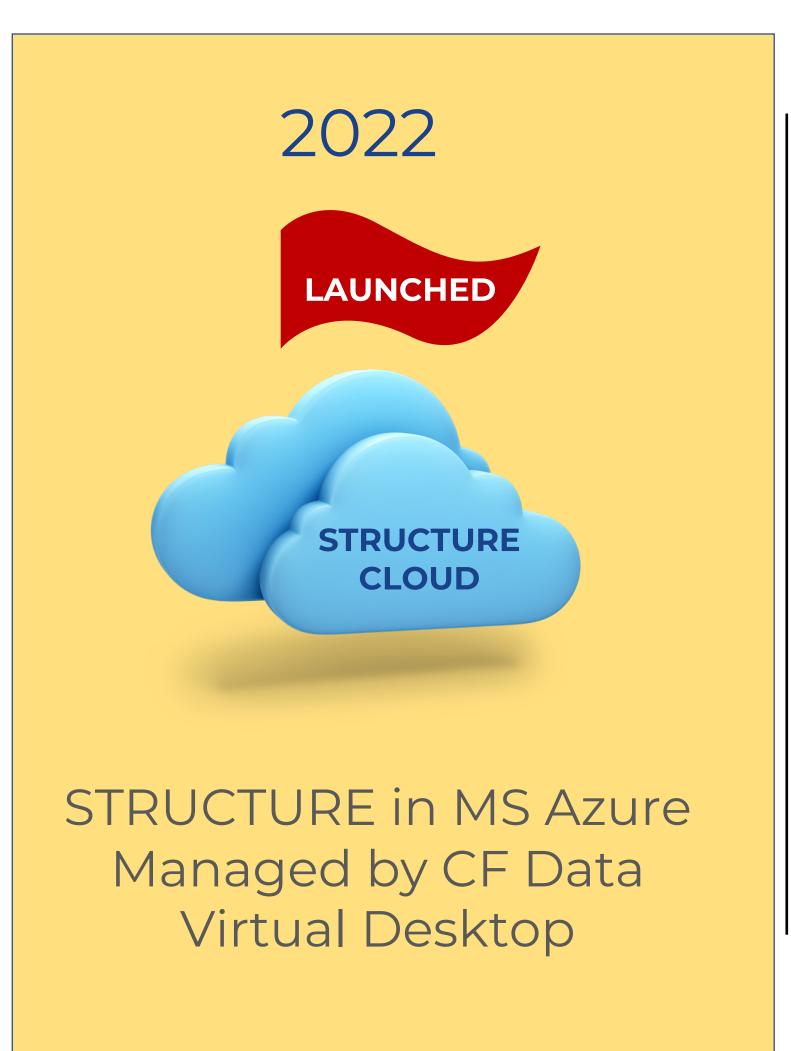








ROADMAP



Structure v18



C/F DATA SYSTEMS



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2024+

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Native Web UX Mobile Redesign **Open APIs**

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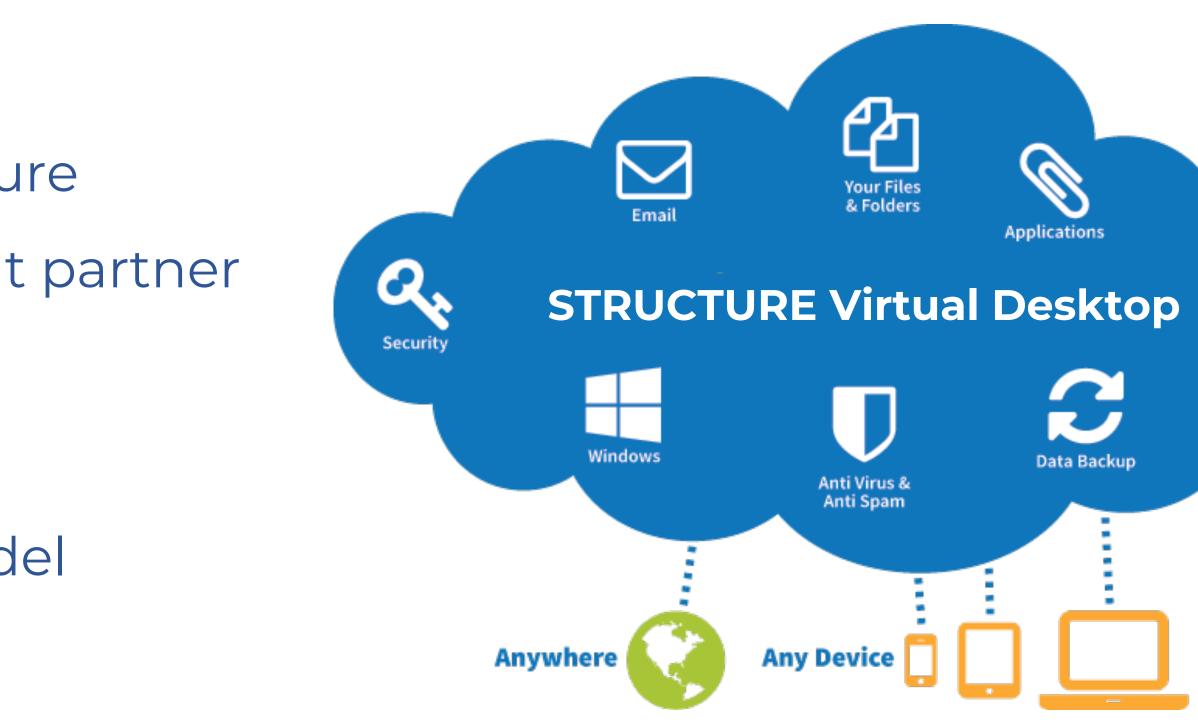
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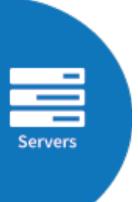
STRUCTURECLOUD ("PHASE 1")

Available **now**

- Delivers current STRUCTURE in MS Azure
- Hosted by C/F Data, with management partner
- Uses Windows Virtual Desktop
- No customer hardware or IT needed
- Pricing transitions to subscription model









STRUCTURECLOUD ("PHASE 1")

Features & Benefits

- Accessible anytime, anywhere
- Centralized monitoring and troubleshooting
- Designed for network security, virus protection, data backup
- Dedicated support for your data migration
- Data is: Private, Secure, Backed up, **Owned by You**







ROADMAP

2022



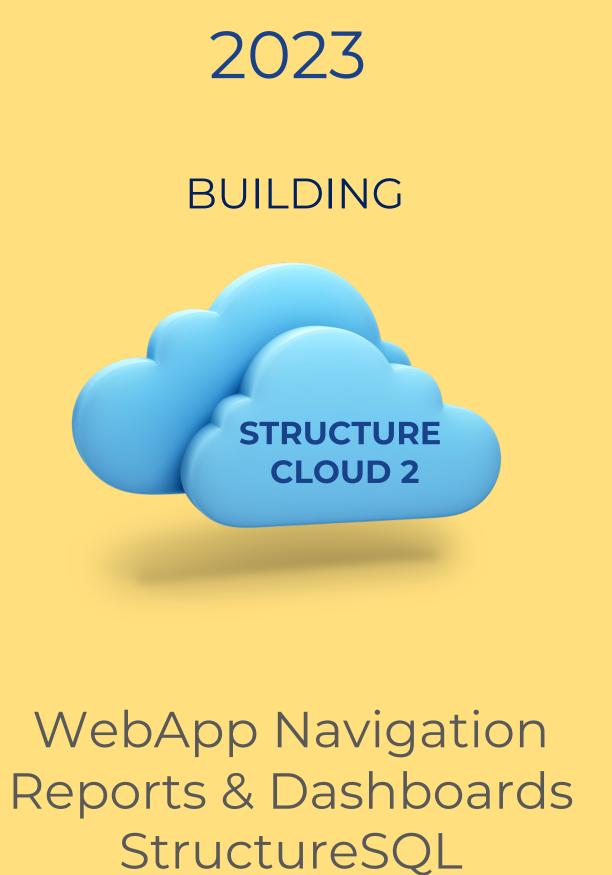
STRUCTURE CLOUD

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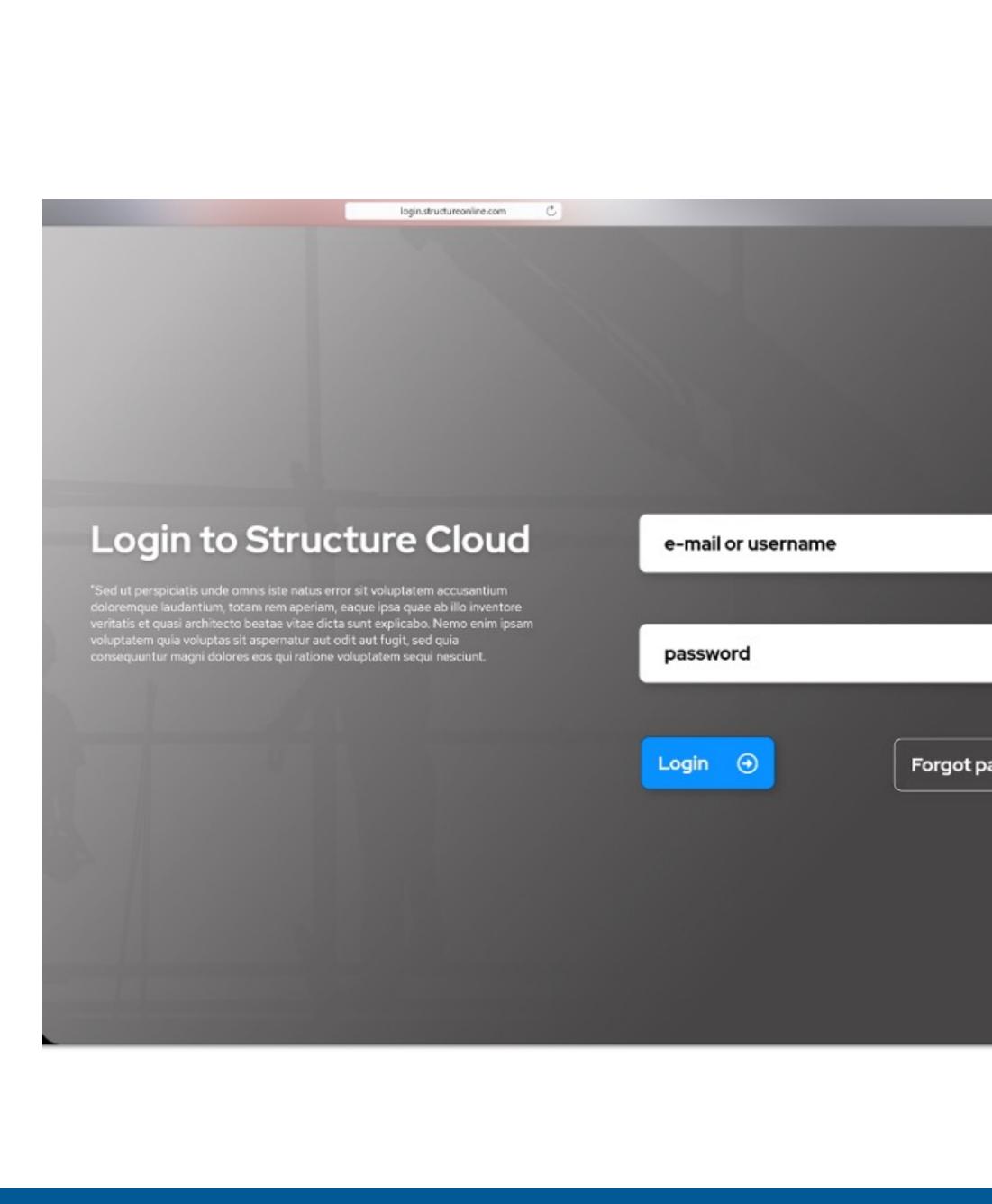
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- Currently in development Target: 2023 release
- STRUCTURE hybrid webapp
- Removes Remote Access/Virtual Desktop
- Standard browser login & password mgmt
- Multifactor authentication
- Automated billing









Features & Benefits

- Runs in a browser
- Web navigation w/ STRUCTURE procs
- StructureSQL database allows for:
 - Web dashboards
 - Enhanced reporting
- Business logic untouched (risk mitigation)

Structure Cloud

DASHBOARD

Executive Center

STRUCTURE CORE

Accounts Receivable

Accounts Payable

General Ledger

Job Cost

Payroll

Project Management

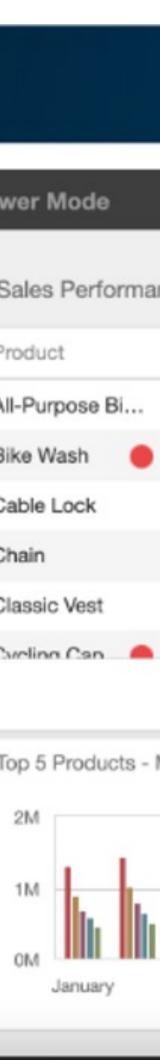
+ STRUCTURE PLUS **Casim Online** Casim Online iFrame C/F Data Support

Promaster

Planroom

STRUCTURECloud Dashboard Viewer Mode

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	Sales Performance	All
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Structure

Cloud

Proc Menu Dashboard (DevXPress)

æ	DASHBOARD
	Executive Center
•	STRUCTURE CORE Accounts Receivable
	Accounts Payable
	General Ledger
	Job Cost
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	Project Management
+	STRUCTURE PLUS
	Casim Online
	Casim Online iFrame
	C/F Data Support
	Promaster

DASHBOARDS

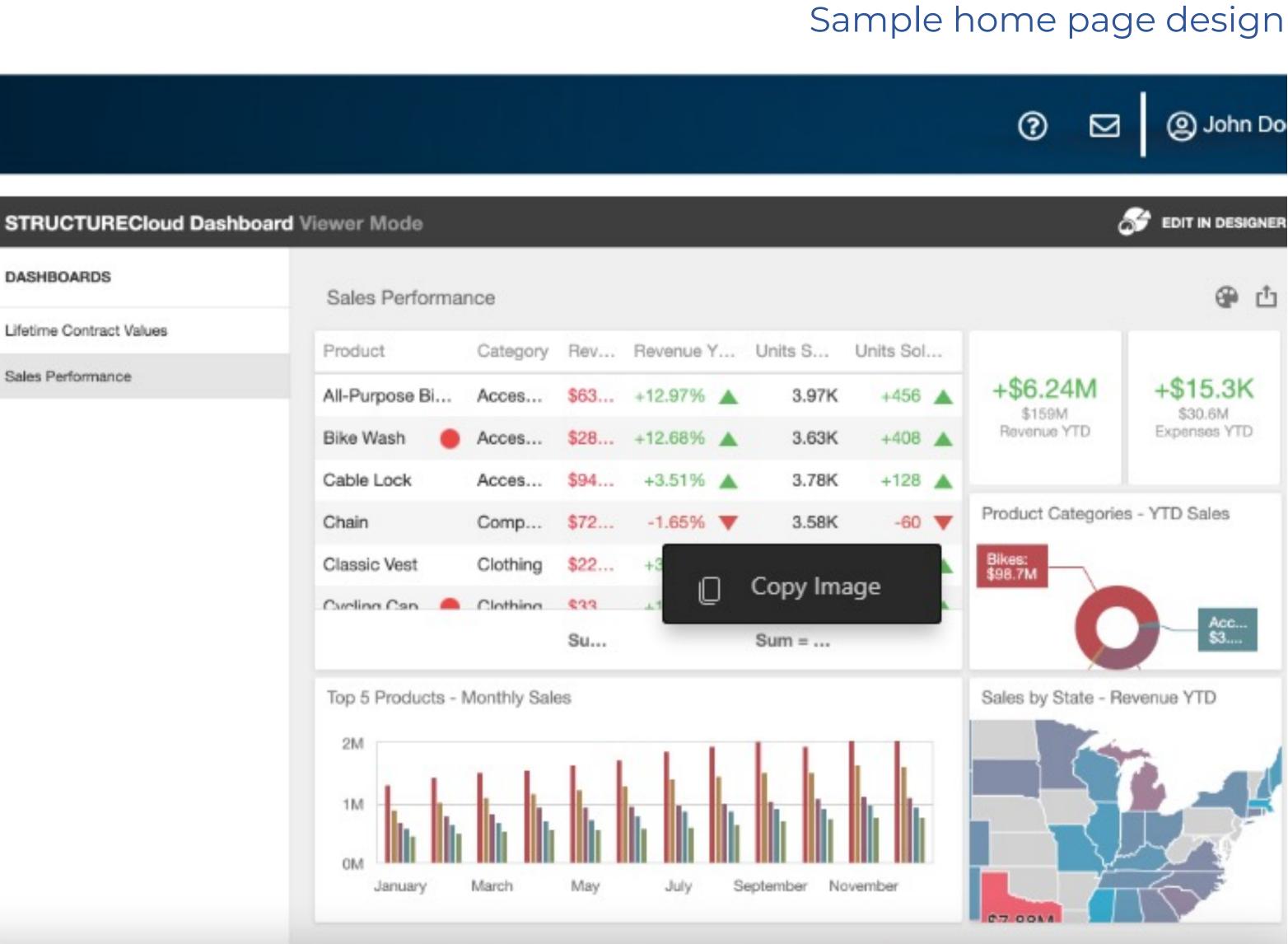
Lifetime Contract Values

Sales Performance



C/F DATA SYSTEMS







Proc Menus

≣	Cloud	
*	Home	
	Dashboard	
	Structure Core	^
	Accounts Receivable	
	Accounts Payable	
	General Ledger	
	Payroll	
	Job Cost	
	Quotes/Proposals Process	sing
	Quotes Processing	
	Work Orders	
	Purchase Orders	



C/F DATA SYSTEMS



Accounts Receivable Accounts Payable General Ledger Payroll Job Cost Jobs Change Orders Cost Labor Time Entry **Production Tracking**

Contract Billing



STRUCTURE procs displayed in browser

Sample proc – JJI Job Inquiry

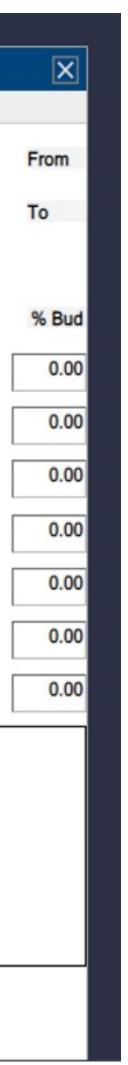
Inquiries and Reports INQUIRIES WITH PRINT BUTTON JSI: Summary Inquiry for Job: JCI: Detail Cost Inquiry JBI: Budget and Cost Inquiry/ JJI: Summary for a Job/Drill C JPI: Cost Plus Inquiry JIH: Original Invoice Inquiry/R 000 ** NO DESCRIPTION ** DETAIL COST REPORTS JDC: Detail Cost by Job or So JDX: Detail Cost by Job by Ke JMR: Markup Report for Unbil SUMMARY REPORTS JPB: Multiple Periods Budget JHR: Hours Report by Job Phs JBH: Budget vs Actual Hours/

LTC - The Learning Company	JJI - Summary for	a Job/Drill Down chris Se	ssion: Mode		
intScreen <u>W</u> ho Hot <u>K</u> eys <u>H</u> elp					
Job#			Select Cost	Starting Date	00/00/00
Cust#:				Ending Date	99/99/99
Sales Rep: PM:					
Cost	Hrs/Qty	Selected Cost	Cost To Date	% of Tot	All Budgets
LABOR	0.00	0.00	0.00	0.00	0.0
BURDEN	0.00	0.00	0.00	0.00	0.0
MATERIAL	0.00	0.00	0.00	0.00	0.
	0.00	0.00	0.00	0.00	0.
EQUIPMENT	0.00	0.00	0.00	0.00	0.
SUBCONTRACTORS	0.00	0.00	0.00	0.00	0.0
MISCELLANEOUS	0.00	0.00	0.00	0.00	0.0
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C/F DATA SYSTEMS



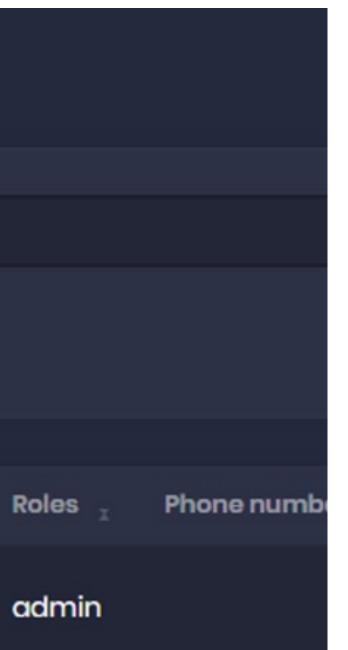




Enhanced Admin Capabilities

User management Role definition Automated Billing

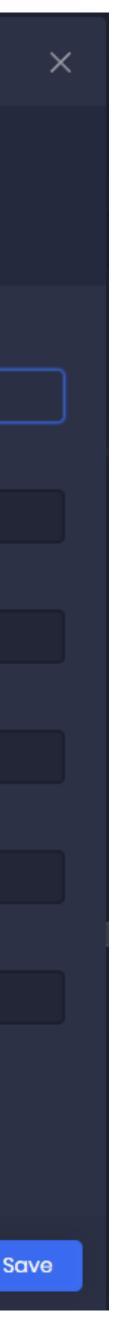
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New user

User information	Roles	Companies(())
Mobile			
UserName *			
Name *			
Surname *			
Password *			
Email *			
PhoneNumber			
🔽 Active			
LockoutEnabled			
Send Confirmatio	on Email		
		Capool	

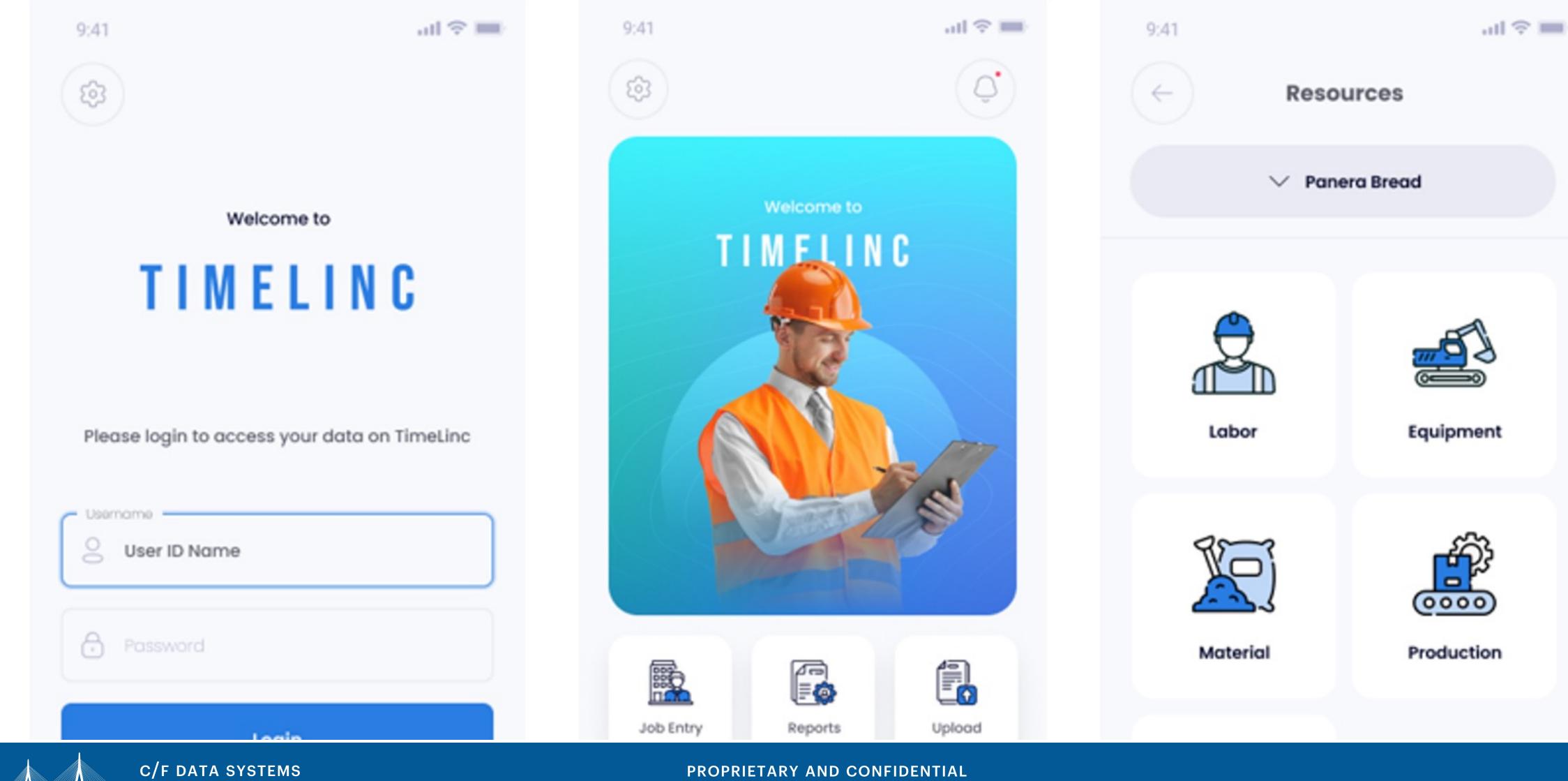








STRUCTURECLOUD 2 Mobile apps "reskinned"







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Design & Development focus in 2023

- Redesign STRUCTURE screens for native web look & feel
- Redesign mobile apps to be form-based
- Seamless Web+Mobile integration
- Build out integrations ("StructurePlatform")











STRUCTURECLOUD 3 Design & Development focus in 2023

Remember, THE FUTURE always looks like this...









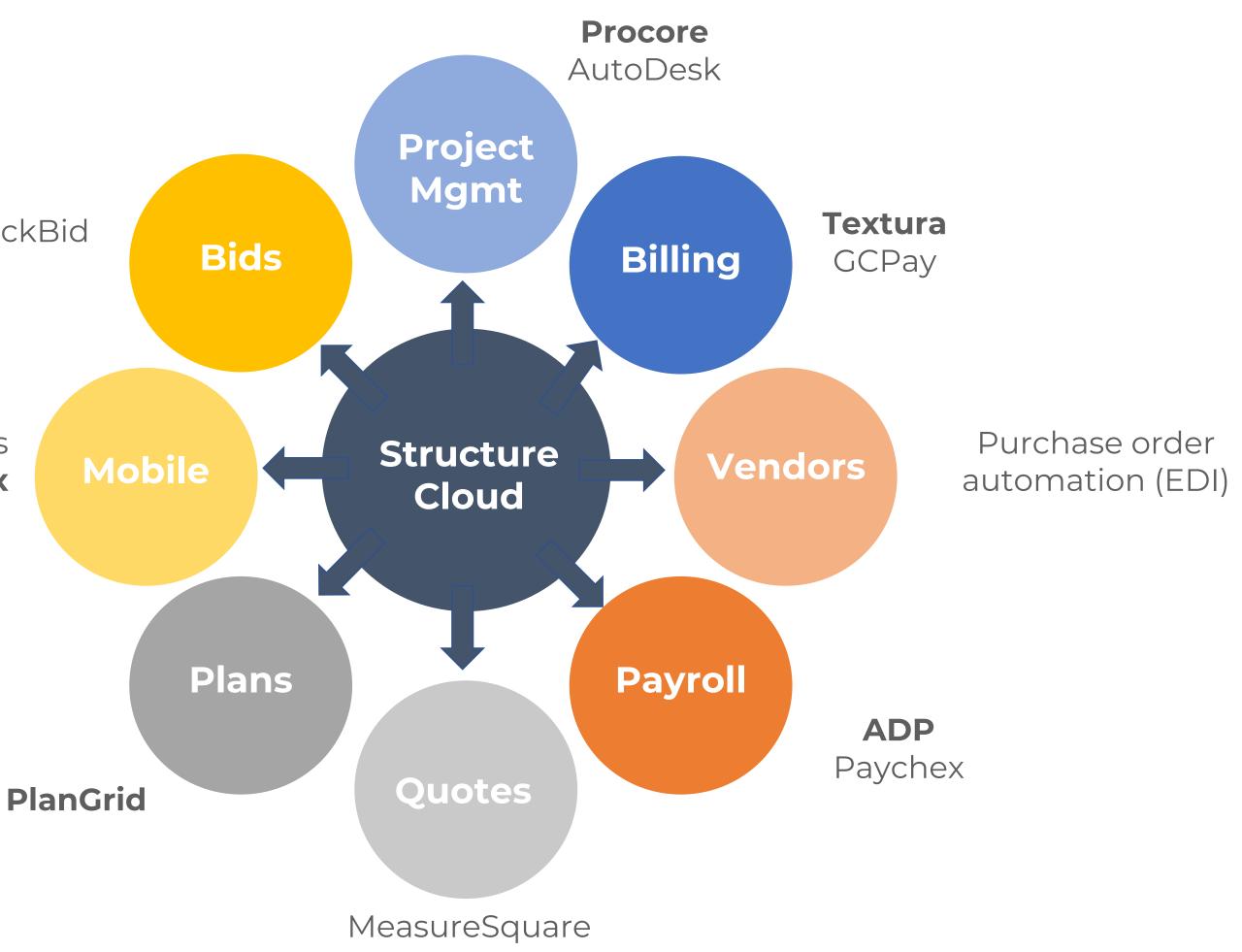
"STRUCTURE AS A PLATFORM"

QuickBid

GOAL Contractor accounting/ERP platform designed for best-of-breed connectivity

T&M apps **Rhumbix**









SUMMARY

- Multiyear effort to modernize STRUCTURE
- Will transform: Delivery, Data access, Reporting, Look & Feel, Mobile capability, Integrations
- Phased Approach minimize risk
 - Consider migrating **Now.** StructureCloud
 - **Next.** StructureCloud 2. WebApp + StructureSQL
 - **Later.** StructureCloud 3 UX redesign + open APIs

Goal: Best-in-class features, look & feel, connectivity... ...to match our best-in-class service & support.







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