

CSI Electrical Contractors



 Electrical

 300 - 500

 California

Life Before Levelset



Filling out preliminary notices manually and sending to a third party was time consuming.

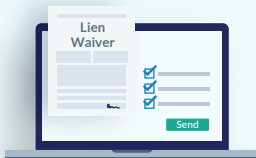


The company was growing, and they needed something more efficient than email to track subtler waivers.



The AR department had to constantly run reports to make sense of payment status.

Here's Why CSI Electrical Partners with Levelset



Automated preliminary notices

CSI files an average of 1,200 preliminary notices/year. In Levelset, those notices are automatically created and sent out three to five days from the job deadline without manual input.

Visibility into document status

CSI can easily track whether notices or lien waivers have been sent and/or received from one place online rather than searching through emails and files.

Project Tracking			
Project	Next Deadline Info	Amount Due	Customer
	<div><div></div><div>Preliminary Notice</div><div>Due in 6 days</div></div>		
	<div>Required</div>		<div>Send</div>
	<div><div></div><div>Notice of Intent to Lien</div><div>Due in 23 days</div></div>		



Verification of job details

A team of research professionals finds and verifies important job site and lender information to ensure CSI sends valid preliminary notices.

"Of all the platforms we've purchased, Levelset is the best decision that I've made. If you're looking to save time and efficiency, it's a fair price, and if you're sending any large amount of preliminary notices, I would say it's a no brainer."

Louie Trujillo, Director of Project Controls

★★★★★ 2,000+ reviews on  Trustpilot

