



 **quickbase**

**Realm Admin Customer  
Network Qrew**

January 10, 2024

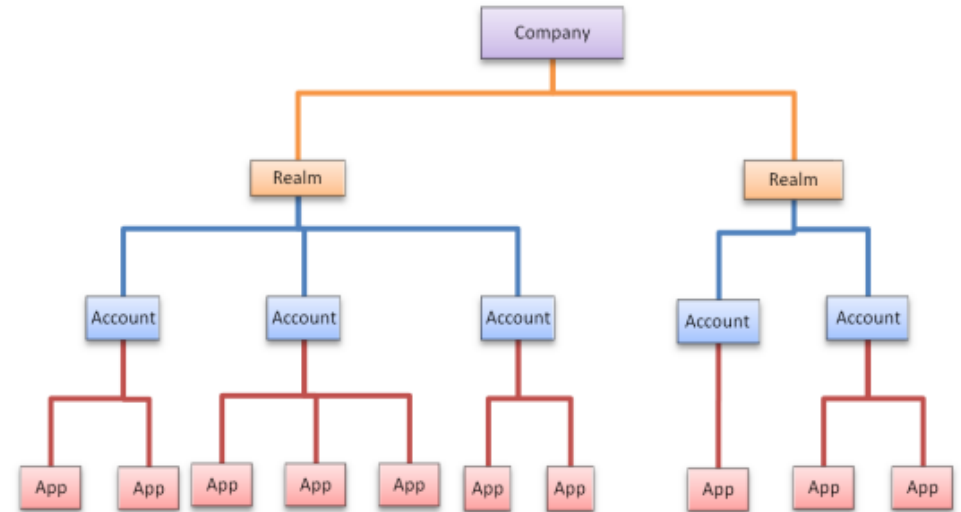
# Agenda

## Welcome

- Introductions

## Agenda

- Presenter of the day: Ventsislav Tasev
- Open Q&A
- Qrew Announcements



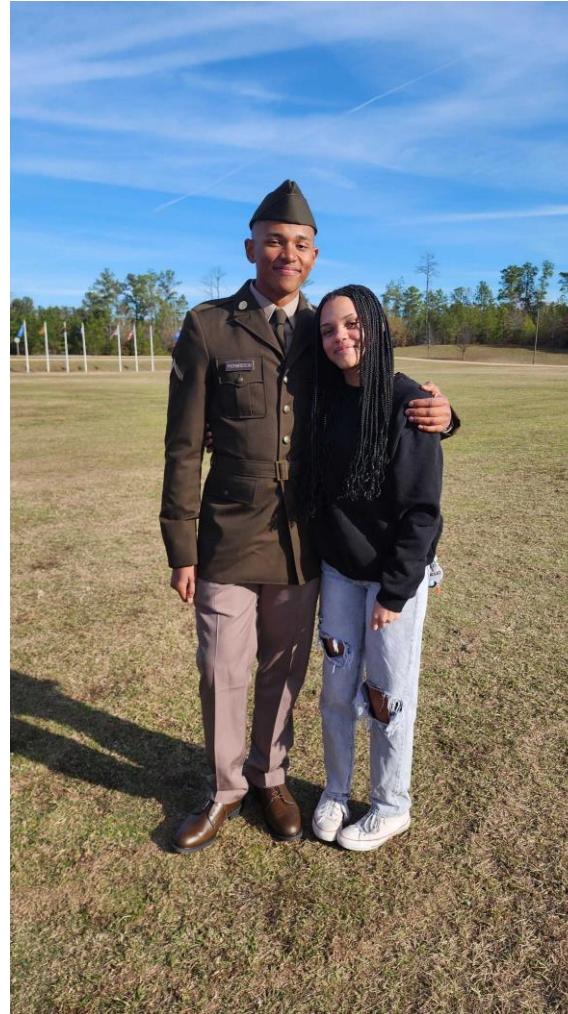
Hello There!



## Jenn Richardson

Customer Success Manager

- **Verona, WI**
- **Quickbase CSM since March 2022**
- **Worked with Quickbase platform for over 10 years**
- **Wisconsin born and raised**
- **Mom is my first title**



# Expert in the Room



## Ventsislav Tasev

Group Product Manager

- Sofia, Bulgaria
- In Quickbase since June 2021
- Responsible for Governance, ALM and Pipelines Infrastructure/Foundations



# Instructions

Go to

[www.menti.com](https://www.menti.com)

Enter the code

1797 2579



Or use QR code



 admin console



 quickbase

## *Admin Console Connected (Sync) Tables*

Realm admins can pull various account/realm data points currently organized in three separate tables **apps**, **users** and **access**, and sync them into one of their applications.

This enables easier and scalable governance, reporting and account/realm management



ID	In Realm Company	Username	External Auth ID	Last Name	First Name	Realm Approved	Email	Can Create Apps	Number of Groups Managed	Last Access	Number of Groups	Realm Registration Status	Realm Admin	Access Status ↓	Account Admin	Super User	Receive security question reset requests	Can Create Tokens	# of apps managed	App Admin	Pipelines create permission	Access to Solutions	Authentication
64280599.bufz	<input type="checkbox"/>					<input type="checkbox"/>		<input checked="" type="checkbox"/>	0	01-01-1900 12:00 AM	1	Unregistered	<input type="checkbox"/>	Quickbase staff	NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>		<input type="checkbox"/>	Following realm rules
63459777.cfju	<input type="checkbox"/>					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	0	07-27-2023 12:44 PM	0	Registered	<input type="checkbox"/>	Quickbase staff	Full	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2	<input checked="" type="checkbox"/>	Specific channels	<input checked="" type="checkbox"/>	Following realm rules
64368208.djm2	<input type="checkbox"/>					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	0	10-11-2023 01:52 PM	0	Registered	<input type="checkbox"/>	Quickbase staff	NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	Specific channels	<input type="checkbox"/>	Following realm rules
63501964.bmf8	<input type="checkbox"/>					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	0	01-01-1900 12:00 AM	0	Registered	<input type="checkbox"/>	Quickbase staff	NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>		<input type="checkbox"/>	Following realm rules
63413118.dm6p	<input type="checkbox"/>					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	0	07-11-2023 03:24 PM	0	Registered	<input type="checkbox"/>	Quickbase staff	NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2	<input checked="" type="checkbox"/>		<input type="checkbox"/>	Following realm rules
63481822.b9br	<input type="checkbox"/>					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	0	01-01-1900 12:00 AM	0	Registered	<input type="checkbox"/>	Quickbase staff	NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>		<input type="checkbox"/>	Following realm rules
63511375.ckmq	<input type="checkbox"/>					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	0	01-01-1900 12:00 AM	0	Registered	<input type="checkbox"/>	Quickbase staff	NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	Specific channels	<input type="checkbox"/>	Following realm rules
63360716.cs7d	<input type="checkbox"/>					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	0	03-22-2023 06:27 PM	0	Registered	<input type="checkbox"/>	Quickbase staff	NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2	<input checked="" type="checkbox"/>	Specific channels	<input checked="" type="checkbox"/>	Following realm rules
63400480.cib2	<input type="checkbox"/>					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	0	05-02-2023 02:56 PM	0	Registered	<input type="checkbox"/>	Quickbase staff	NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>		<input type="checkbox"/>	Following realm rules
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63211685.rkim	<input type="checkbox"/>					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	0	01-01-1900 12:00 AM	0	Registered	<input type="checkbox"/>	Quickbase staff	NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>		<input type="checkbox"/>	Following realm rules
62997295.e54n	<input type="checkbox"/>					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	0	03-01-2023 04:16 PM	0	Registered	<input type="checkbox"/>	Quickbase staff	Full	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4	<input checked="" type="checkbox"/>	Specific channels	<input checked="" type="checkbox"/>	Following realm rules
63220496.cijj	<input type="checkbox"/>					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	0	10-25-2023 01:48 PM	0	Registered	<input type="checkbox"/>	Quickbase staff	NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	<input checked="" type="checkbox"/>	Specific channels	<input checked="" type="checkbox"/>	Following realm rules
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62904989.chrt	<input type="checkbox"/>					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	0	01-01-1900 12:00 AM	0	Registered	<input type="checkbox"/>	Quickbase staff	NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>		<input type="checkbox"/>	Following realm rules
62600996.duhe	<input type="checkbox"/>					<input type="checkbox"/>		<input checked="" type="checkbox"/>	0	06-06-2023 12:49 PM	0	Unregistered	<input type="checkbox"/>	Quickbase staff	NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2	<input checked="" type="checkbox"/>		<input type="checkbox"/>	Following realm rules
62847168.bgyr	<input type="checkbox"/>	vtasev				<input type="checkbox"/>		<input checked="" type="checkbox"/>	1	01-08-2024 11:52 AM	1	Registered	<input checked="" type="checkbox"/>	Quickbase staff	NO	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	Following realm rules
63075107.b8pe	<input type="checkbox"/>					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	0	11-07-2023 08:05 AM	0	Registered	<input type="checkbox"/>	Quickbase staff	NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6	<input checked="" type="checkbox"/>	Specific channels	<input type="checkbox"/>	Following realm rules
63220892.gyfu	<input type="checkbox"/>					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	0	01-01-1900 12:00 AM	0	Registered	<input type="checkbox"/>	Quickbase staff	NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>		<input type="checkbox"/>	Following realm rules



## Typical Use Cases

- set up alerts/notifications:
  - when a new user is added to certain confidential app
  - when someone's access level is changed in an app
  - when the total amount of user and/or apps in my realm reaches certain threshold
  - when someone is given app/pipeline/user token create permission
  - keep track of open to internet apps (EOTI)
- build workflows:
  - when a new user is added to my realm, send him an email
  - use new app creation as a trigger to start an internal compliance process
  - in combination with our Audit Log API, log app changes/modifications based on the Last Modified date
  - monitor user access and permissions
- create custom reports and dashboards - use the data from the connected tables to create and easily customize the unique view that the organization needs







### Apps Table (Nov 2023)

- Manager Status
- # of users with any access
- # of users with direct access
- Last Access
- Mobile offline enabled
- Data change logs enabled
- Sandbox required
- Sandbox enabled

### Users Table (Dec 2023)

- Account admin
- Super user
- Receive security question reset requests
- # of apps managed
- Pipelines create permission
- App admin
- Can create tokens
- Access to Solutions
- Authentication

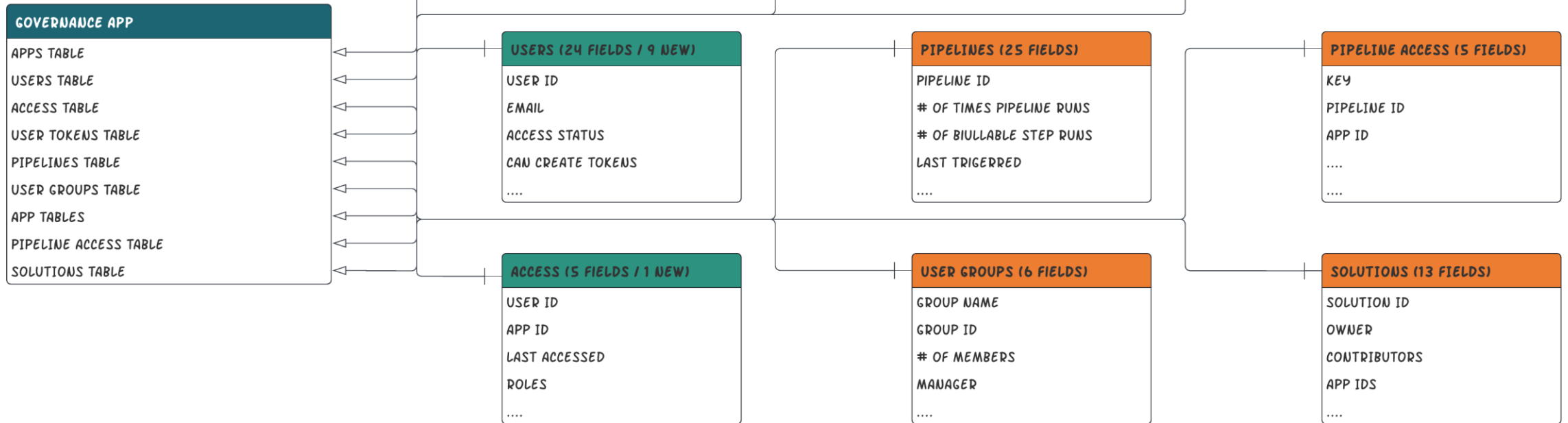
### Access Table (Jan 2024)

- App-Level permission (None, Basic, Admin, Sharing,)



EXISTING TABLES

NEW TABLES



 admin console



 quickbase

### Next Steps:

- **keep** the current pricing & packaging (available on Business and Enterprise)
- **remove** the existing limit of 3 tables per realm
- **add** a limit so that a table can be pulled only once
- **consider** multi-account setup support
- iteratively **release** new data sets
  - exact timeline still TBD
  - Pipelines and/or User Tokens in Q1

# Qrew Bulletin Board

## Quickbase Every Day Office Hours

Bring questions or just watch and listen as audience members present their use cases and questions to our resident QB expert, Sam Trachy, 1-2 PM EST Daily



## FastField Office Hours

Join a free Q&A session to learn more about FastField, Quickbase's mobile data collection integration, from an expert.



### Apply to be Qrew Champion!

The Qrew Champions program is for passionate Quickbase customers interested in advocacy and community leadership opportunities

## Connect with Me



Have questions, want to do an app showcase, or need help connecting with another network member? Reach out to Jenn Richardson [jenrichardson@quickbase.com](mailto:jenrichardson@quickbase.com)

## Upcoming Quickbase Qrew Events

- [All Quickbase Events](#)
- [FEBRUARY Realm Admin Customer Network Qrew](#)
- [App Builders Customer Network Qrew](#)
- [Mobile Customer Network Kick-off](#)
- [Pipelines Customer Network Qrew](#)
- [Healthcare Customer Network Qrew](#)
- [Manufacturing Customer Network Qrew](#)
- [Architecture, Engineering & Construction \(AEC\) Customer Network Qrew](#)
- [Education & Non-profit Customer Network Qrew](#)



# Apply to be a Qrew Champion

The screenshot shows the 'Be a Qrew Champion' application page. At the top, there is a navigation bar with links for Home, Challenges, Referrals, Rewards, and FAQ. On the right, there are notification icons for a bell, an envelope with a '4' badge, and a mail icon with '1,070'. A user profile picture is also visible. The main header features the text 'Be a Qrew Champion.' in orange and white, followed by a sub-header: 'Get recognized and rewarded for your advocacy, leadership, and community contributions. Tackle tasks, earn points, win badges, and move up the ranks.' To the right of this text is a large graphic with the word 'The Qrew' in a stylized font, where 'Q' is large and orange, and 'rew' is in white and green. Below the header, there are several cards: 'You're invited - be a Quickbase reference', 'Welcome to the Qrew! You're in!', 'Welcome to Quickbase Heroes!', and 'Learn Challenge'. A 'Daily Bonus' section shows a progress bar for claiming points (1, 2, 4, 8, 10). An 'Activity' section lists recent posts and replies. At the bottom, there is a question: 'How has Quickbase impacted your...'

## Benefits include:

- Access to exclusive content and resources, like the PMI Citizen Development Foundations course
- Collaborate directly with Quickbase product teams to inform product roadmap, provide product feedback and get new feature sneak peaks
- Engage in exclusive speaking, content creation, and personal branding opportunities to showcase your expertise
- Gamified platform and opportunity to earn rewards & badges





**Thank you for attending!**