Transblue is a World Class leader in facility services. Our clients are large multi-site fortune 500 brands. We provide routine maintenance, general construction, and emergency services to clients throughout North America.

We are seeking a new software solution to handle large construction projects and routine maintenance such as landscaping. We need to be able to dispatch work orders and emergency services off of hourly rates and fixed fees.

We are looking for a flexible and nimble company to partner with that can make changes and adjustments while offer the best price possible for the required services.

We are looking to make a change immediately; we currently use YETI for snow and ice operations, and we USE LMN for Construction. Our accounting solution is QuickBooks.

We are looking forward to a detailed review of your software, please walk us through each section of your software showcasing how you address each of the topics:

Accounting

Operations

Technology

Sales

Legal

Comments

Please be prepared to discuss pricing, start up costs if any, and any costs we may not know about and any hidden costs, any costs for customization, etc. Implementation requirements and time frames, and what staffing requirements on our end would be required to maintain your software solution, please be prepared to discuss training and ongoing support, who will be out success manager who onboards clients. Please provide three references for similar enterprise level clients who currently utilize your service and have more than 24 months.

Provide explanation of two similar clients you onboarded and are no longer with your solution and what went wrong and what you have done to improve your solution.

What is up and coming with your solution that is not currently offered but will be offered in the next 12 months and then 24 months.

Components we are looking for are as follows:

**Accounting:**

* One-touch invoicing.
* High volume invoicing.
* Quick books Integration.
* Stop payments or red flag if GM% is above or below set limits.
* Automatically see what subs work is eligible for payment based on payments received by customers.
* Uniform naming of customers, subs etc. for COA.
* All details in the CRM will link to QB, especially job id numbers.
* Ability to flag specific services for accounting to review.
* Reporting. Similar to QB integration, customer and project balances are updated in real time with invoices out, payments in, etc. real time reporting.
* Project Budget or Margin Tracker
  + Ability to easily view or create reports showing project margins or budgets.
* Credit Cards ACH –
  + We need to be able to run credit cards or ACH payments from customers the second a job is complete or prior.
  + **Invoicing:**
    - Something close to auto-generating and send invoices with the structure for payments via email, the app,
    - Software will auto generate a subcontractor total once the work is complete.
    - Sub should be able to invoice Transblue following the completion of services.
    - That invoice should be able to be reviewed and accepted or declined.
    - We should be able to automatically add completed services to a que to be uploaded each morning and sent to the customer.
    - Must have a main customer and then sub customers would be each site
    - Need a way to manage service fees/pricing-flexible range of service types (including seasonal, hourly, quantity, per push, per lb.) number/address under the main customer (Like LMN).
    - No billing to main customer
    - The ability to go through services reported by the sub and "reject" them if they are out of compliance.
    - Rejecting makes it so it won't populate on customer billable or subcontractor payable reports.
    - Sub is notified of services being rejected, along with report about the rejection.
    - The software would generate a report of the services performed by subcontractor and send a report of those services to the subcontractor weekly/monthly (whatever we decide) this would essentially be used as their template to invoice from.
    - Any services invoiced outside of this report would be rejected.
    - A way for subs to upload invoices, like for black rock coffee.
    - Also, a way to view all of these invoices in a spreadsheet where you can search / filter / export. It would make it easier to keep track of invoices and make sure the subs are getting paid. (exportation)

**Operations**:

* Ability to track all issues/projects related to a client - e.g., if I pull up Wells Fargo, I can easily see current and past contracts, timing, AR balance, communications, etc.
* full client management
* Project Scheduling and Tracker
* Similar to a GANTT chart.
* Scheduling,
* project dispatch,
* Weather integrations, meaning integrate with NOAA, or Weather underground,
* Work order management,
* Inventory tracker
* Full employee access with security
* All employees should be able to access most of program.
* Software should be able to limit total access such that only certain employees can see everything.
* 4 tiers of users. Transblue, to aggregator, to primary sub, to crew
* The ability to sign in with our Transblue email addresses.
* Ability to manage the team and account managers within software.
* Complaints - clients, subs, and staff can submit complaints through the software.
* PM only section
  + Part of the app dedicated to the project manager. Including project timelines start date and date app that allows them to add pictures of daily logs.
    - Client communications send updates to clients all in one place.
* Values –
  + Daily login to software from crew or admin will have a Transblue core value along with a motivational quote from a department leader.
  + After every service a core value is generated
  + Training
    - Train team members on key service requirements.
    - Computer based learning app that shows processes to be successful in Transblue by Transblue.
    - Specialized training for leaders and upcoming talent.
    - Integration of FAQs for our team members that'll elevate escalations unless necessary.
* Weather
  + Software will have real time & up to date real time weather, forecasting, & tracking.
  + Temperature, Depth of snow, ground state (icy, dry, wet, snowy), weather (sunny, raining, snowing, overcast)
  + Time stamp on service.
* Sub Contractors:
  + Subcontractor has ability to add additional drivers to their routes.
  + Subcontractor can leave notes on specific services (i.e... "Cars parked in stalls will return later to salt those spots")
  + When subcontractor rates change during season, the ability to retroactively apply those rate changes to specific date ranges.
  + Every site has services to select from, site specific site maps, and notes for the sub to read before servicing.
  + Compliance Score Card - For our subcontractors to see who's in compliance with our standards.
  + Subcontractor Surveys- In app Surveys randomly after services that provides us with feedback on Transblue and our software’s etc.
  + Rewards system - Amazon gift card if compliance score above 85% over whole season or projects
* Reporting -Excel type reporting showing services, vendor, time stamps, services rendered, dates, etc. Filtered reporting for past services.

**Technology:**

* Mobile app for our phones, as well as limited access for subs to input.
  + Pay and receive invoices through the app.
  + The App should only allow staff, subs, clients what they need to see. Sub should not see full list of sites but just those assigned to them.
  + It should however allow an emergency site to be added or removed.
  + Sub should be able to create a service and billing report from the app and email report to himself or his own admin team.
  + Onsite notifications. when a subcontractor arrives on site, and they get notified to check in.
* Alerts for missed work- Send alert to sub and dispatcher if sub was supposed to be at site but didn't check in.
* Internal notifications for missed sites.
* When site is missed a check in the internal team is notified.
* Integrates with other software (API) Service Channel, Corrigo, FM pilot, Versie, work oasis, etc.
* If workorder is created in ServiceChannel the software should automatically upload that and ask for ops to assign a crew and auto send it to that crew
* Microsoft integration- Connect into Microsoft to schedule meetings, send emails, send reminders, etc.
* Form Creator – auto-fills client information into forms, (invoices, letterhead, notices, etc.)
  + Customer information options:
    - Master customer tracked, (TB Tacoma). 2nd tier customer, (Lowes NW Region), 3rd tier customer (Lowes store 2398) these have to be able to also load to QuickBooks.
* Operations and Job hand off, all needed and required items loaded into a form built and driven system.
* Email integration –
  + Ability to save emails to clients and/or projects.
  + Email sent to subs when services is forthcoming.
  + Mass email subs at the end of a month so they can review what they will be paid for request changes- no invoices this was on maintenance.
* Financial Dashboard -Provides the current financial KPIs on projects for GC (Gross Margin, Job Costing, On Schedule, Site Visits).
* Company Dashboard. I think it would be cool to be able to see a pipeline of everything that’s going on in the company all at once, like sales goals, apps being developed, big media projects. Almost like a Ninety, but for the whole company instead of individual departments.
  + At the end of the year, it would provide great insight into everything we've accomplished.
* Ability to save documents to clients and/or projects.
* Have the ability to accept or reject work orders in real time.
* Ability to decline work orders not original to the contract and or in scope of the contract.
* Real time collaboration- Instant messages or similar where staff can communicate, in real time, about a project or client or contractor, or crew lead while looking at that project or client files on screen.
* Software expires a work ticket if not completed on time.
* Customer Portal (two way facing, sub and client)
  + clients can log in real time and see progress of projects.
  + Be able to communicate with a client directly through the software, share info etc.
  + Customer portal to generate auto report of services, time completed, attach all pictures and auto sent to customers
  + As operations is going through services performed by subcontractor, the ability to send the report to the client directly from the software.
  + The PDF auto populates in an email with an editable email body.
  + Live agent in app 24/7 to answer any subcontractors’ questions,
  + Reject services in real time.
* auto dispatch
  + Dispatch services from software, based on triggers or weather, provides tracking numbers and those numbers are sent to the SP weekly.
* Subs don't have to pay for app in order to get access to the job number.
* GPS Tracking
* ability to track work orders while the work order is open.
* Subcontractor can edit the order of sites on their routes.
* Mandatory pictures, make pictures mandatory or work order cannot be closed out. Minimum 4 pictures.
* Sequential order, make it so you have to follow a certain order if step A isn't done you cannot move to step B which means the work order cannot be completed.
* Service verification -Ability for crew/vendor to approve services and submit "invoice" to us for billing.
* Anything outside of their approval would not be billed or paid after the fact.
* Service verification reporting and summaries that can be sent to subs for their verification (EX: Sub DW receives a list of services according to our system, if they agree that is what they get paid. No invoices surprising us 3 months later)
* Predictive Reporting If XXXX site is serviced but XXXXX2 site across the road was not reported in the system, a flag is raised for billing dept that XXXX2 should have been serviced and needs billed .
* Client separation. The ability to separate GPM from 7-11 from Walmart or any other clients.
* There is no filter for the dispatch log when reviewing to approve the service.
* Currently we have to filter the snow master spreadsheet and remove the duplicates for subs and then search.
* Being able to house all tickets from different software into once place. Service channel, Corrigo, etc. tickets are logged in one platform and can 'cross talk' without having to log in to each platform individually alphabetically through the dispatch log and compare to the list I create. its very time consuming to do.
* Mapping.
  + Mapping software that can route sites, including start location and end location. Reroute if site is added.
  + We should be able to see sites on a map, select sites, identify is a different sub is in that same area, color code pins but customer or sub
  + There should be a way to have all existing sites pre-mapped and the information from those maps in a data base
* Searchability - date, name, address, job #, key words-like QB
* Services can be edited.
  + As needed services can be edited. Photos can be added, new services can be selected, services can be changed from rejected to approved.
* Ability to generate a report of services performed on certain days.
* Text
  + Ability to add specific temperature and snow triggers to sites and the software would notify the sub via text/email when forecasts reach the specific triggers.
  + Auto text sent to sub when they complete servicing a site in the app.
  + This would ensure to the sub that they used the app correctly, and hopefully make them realize when they forgot to use the app.
  + Text sent to subcontractors when weather forecasts reach triggers.
  + RFP Intake -Strategic intake of business - Before any mapping/measuring, hours, estimating, etc. approval process (intake) in place for sales.

**Sales:**

* Ability to build out costs, whether snow or construction, through buildable metrics.
* Similar jobs added to proposals, intros based on specific jobs, project pictures.
* Media requests A way for people to request media, e.g., the sales team would like a video about asphalt to send to potential clients.
* Pricing for managers in field and estimators in field.
* Estimate must transfer to QB for billings. T&M, Unit pricing, Sq. ft. pricing, task pricing options
* We should have a customizable proposal with images, headers, standard footers, and details per service line (like LMN)
* Sales and Marketing - i.e., Hub Spot type / sales forecasting reporting / marketing project calendar.
* Detailed reporting on won and lost business.
* CMS - Lead Management Track and follow sales leads.
* Stores leads in client management.

**Legal:**

* Able to receive notifications on COI, W9 etc.
* E-signature capabilities ability to send contracts directly through the software and have them housed in the software

**Comments:**

* Remove SharePoint - SharePoint is great for storage and sharing things across teams, but it doesn't work as a "CRM". Contact information, proposals, and signed contracts should be housed in a dedicated "Live" CRM (like Fran Connect) that everyone has access to view with SOPs on uploading information.
* We also need to be able to view and pull reporting for the status on projects, whether they're still in the bidding stage or have been awarded.
* Calendar must be included in software for job visibility, capacity, Roi, and team member management.
* Employee calendar - We built a calendar earlier this year that shows time off for all employees across TransBlue, evergreen brands, call blue, etc. This would be an important feature in an end-to-end software used by the entire company.
* On-going support - On going support with minimal cost if changes need made to tailor to a specific TB request.