Accurex Video Script

Introduction

Hello, everyone! This is Megan -- I'm the Marketing Manager here at FaciliBuild HUB.

Today, I'll show you how we handle project management in the system. I'll show you how you can set up your projects prior to your vendor arriving on site.

Then, I'll show you what your vendor sees when they're on-site performing start-ups.

Finally, we'll look at the post-visit process. Let's get into it.

Project Management – prior to servicer being on site

I'm logged into my account. For this portion of the demo, I'll act as the "project manager" on your team who is setting everything up – I'll show you how they would set the project up, what they have access to, and how they can manage permissions.

- *Start on the Add Project page*
  - Add your new project and fill in all the information.
    - At this time, we do not have field to set a project manager, but that can be added to our development roadmap. We do have an alternative that I can show you in the Project Milestones feature later on that lets you assign tasks to certain users.
- *Once project is added, go to the Teams page.*
  - You have the ability to add external vendors and other project stakeholders with access to project information, like site contacts, customer information, files, and so on.
  - *Show how to add contacts with their information.*
  - Later in the demo, I'll show you how you can assign or share things to users and the difference between them.
  - All the contacts you see here will have access to each other's contact information, making connections seamless. If your site contact needs access to the vendor contact information, they can come to the Teams page and find it.
  - *The ability to maintain a record of contact with established site contact.*
    - Another item on our development roadmap is integrating Outlook and Teams into the HUB so that all project communications can live in one place. This feature will be added to the Teams page by the end of this year.
- *Go to Files.*

    - You can share documents with all users that have access to the project, like Plans, Submittals, and Drawings. The HUB also gives you the ability to limit re-sharing of documents if you want to keep them secure.
    - *Show how you can limit sharing features.*
- *Go to Checklists.*
    - Store all of your pre-visit checklists in the Checklists section. You can create folders - for example, you can create custom folders for pre-visit checklists.
    - The nice thing about our checklists feature is that checklists can be assigned to Organizations – if you have checklists that only fire needs to complete, and not national, you can set this up.
    - Use your checklists to:
        - Confirm permits were submitted
        - Verify all parts needed on site
        - Gas valve on site is verified or provided
        - Gas valve is installed
        - Confirm permit approval
        - Scheduled all on-site dates
        - Scheduled “final”
        - Established contact with the site
        - Confirm completion of pre-visit checklists from site contact
    - You can assign these checklists to your vendors, which they can then fill out, and submit once completed.
- *Go to Project Milestones.*
    - Now, we are in Project Milestones. This is a great feature for your Project Managers to use as it allows them to easily schedule and manage the project from start to finish. As I mentioned earlier, you can use this as an alternative for now to assigning a Project Manager to the overall project – do it through the milestones feature.
    - You can create your project milestone with a date range, from when your team will be on site to perform service to the intended turnover date. Changes can be tracked and managed by the site contact.
        - If needed, you can also easily change your dates – the site contact and assigned users will have this capability (please note that users who are shared project milestones cannot change dates).
    - *Demonstrate adding a few tasks.*
    - Now I’ll show you where we manage POs.
    - *Go to Vendor Accounting.*

        - Your accounting team can fill out all the required fields needed for your Vendor PO, including amount total, PO number, tags, attachments, and terms. Your team and the vendor can view this information.
        - *Share documents specific to the vendor that can't be viewed by other stakeholders (e.g., Vendor PO).*
            - *Project Milestones > Vendor Accounting. Add as an attachment.*
            - *Can also add to Files and share the folder with your vendor.*
    - *Other items on our roadmap for Project Milestones…*
        - *Request for acceptance of proposal – if they reject the proposal, we will require them to provide a reason – such as, they are unavailable or they require a different payment amount.*
        - *Integrate from this tool to internal systems – we can develop APIs to connect FaciliBuild HUB with your team's proprietary software.*

<u>Project Management – equipment start-up phase</u>

For this next portion of the demo, I'm signed in as the vendor to show you what they see.

- *Show teams page, files, checklists, project milestones, etc.*
- A few quick things to address that are on our development roadmap
    - #1: Track vendor arrival to site with a "check-in" and "check-out" capability.
        - We're exploring this feature and will either add in a GPS tracker or add a sign-in or out detail.
            - Currently, in our Facility section, we do have audit logs available if a vendor scans a QR code, which tracks the date and time of when they scanned into the asset and a log of what work was performed.
    - #2: Messaging capabilities with tracking
        - As mentioned earlier, we are in the process of integrating Outlook and Teams into the system.
- *Go to Field Test.*
    - Prior to your vendor arriving on site, your team can build assets that contain forms for them to fill out.
    - The vendor will be able to open the assets and provide important information, like serial numbers.
    - This is all easily accessible and editable from their mobile device.

- There are built in formulas that the vendor can use when running calculations. They can also calculate acceptable ranges, like airflows with % ranges of tolerance.
- The vendor can also upload pictures to the specific assets to provide more visual information to support their findings.
- Any deficiencies found by the vendor can be quickly tracked, both in the field test forms, and by creating issues that can be assigned to the appropriate party to resolve it.
- Another item on our development roadmap is to track percentage complete based on filled vs. empty fields on the report. This will be available in our Insights Reporting tool where you can run a progress report.
- The vendor can also provide updates to the customer on the same day as service provided via the shared details page which will capture communications from Outlook and Teams.

<u>Project Management – post-visit</u>

For the last part of the demo, I'll sign back into my Project Manager view. Let's discuss what needs to happen post-visit before we can close out this project.

- *Go to Reports page.*
  - At the end of the project, your team can provide a report summary based on the vendor's site visit. The report contains observations, measurements, any identified deficiencies, and the overall status of the project.
  - This report can be emailed as a PDF to the customer and any other parties.
  - The report can be approved and made available by deselecting the "Drafts" box.
- *Additional Site Visits*
  - In terms of managing additional site visits, there are a couple of ways that you can handle this.
    - First, you can clone the project. As long as you have the same facility listed on the project (which is automatically cloned), it will save it as a new project under the facility. This is a good method if you want to go back and see all projects performed on a facility.
    - Alternatively, you can go to the Project Milestones section of that project and add a change order. You can do this if you prefer to keep everything in one project.
- *Go to Project Milestones > Accounting.*

    - As you're closing out the project and collecting payment, you can make sure that the invoice total has been reviewed and compared against the PO total (or track if a change order has been added on top of the PO).
- One other thing to call out that we're currently working on is that we'll be able to indicate to the customer that service is complete once the Insights reporting tool is finished; this will allow us to run progress reports.

And that's how you can manage your projects from start to finish in FaciliBuild HUB – as you've seen, we make it easy to connect all teammates to the information they need to perform service. I hope this answered any questions you have – if there's anything else you'd like to know about the HUB, you can reach out to me at megan@facilibuild.com. Thanks!