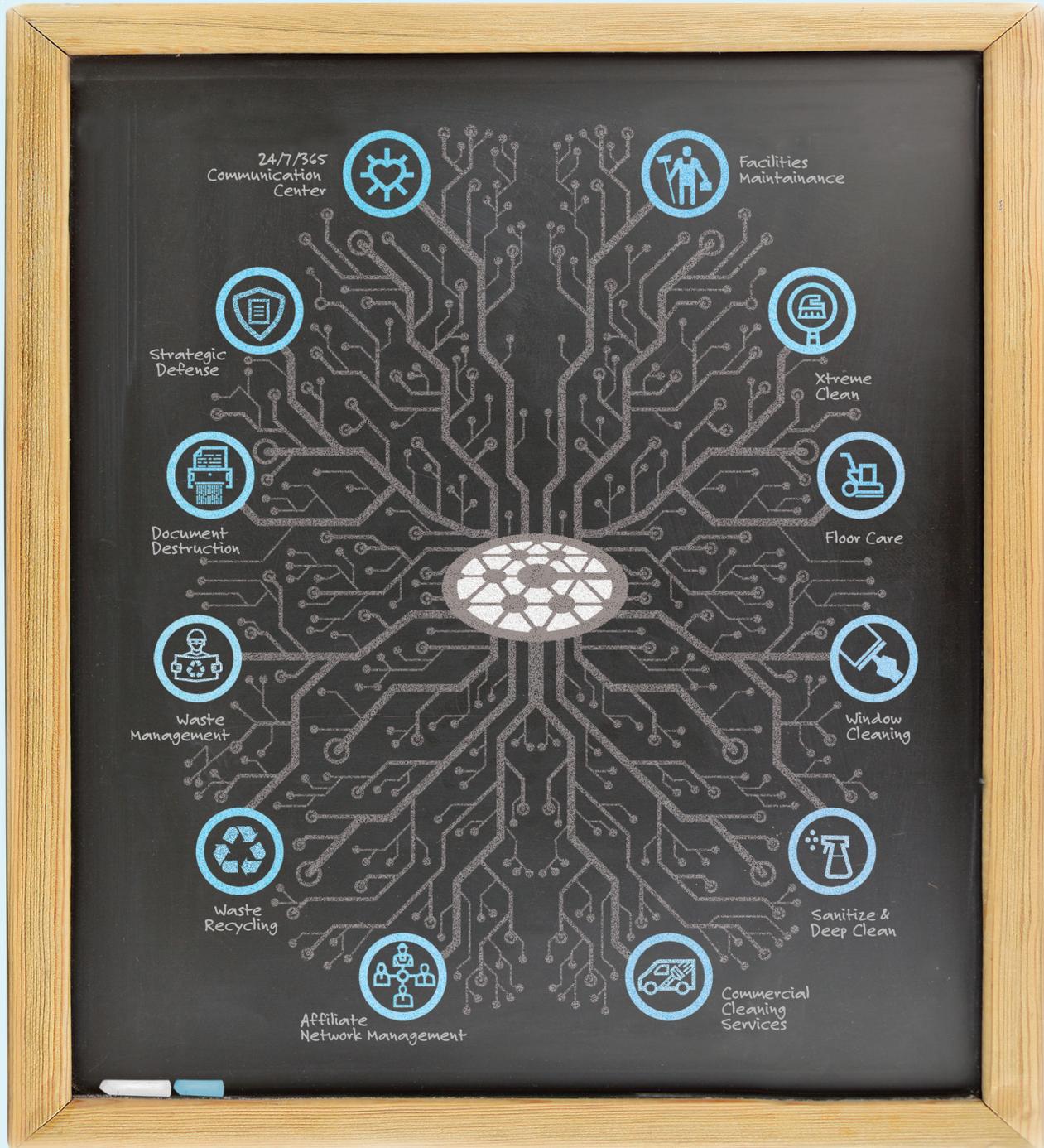


CBtech

Managed Services in Facilities Maintenance



SMART™ TECHNOLOGY

A GAME CHANGER IN MANAGED SERVICES



DESIGNED WITH SCALABILITY IN MIND

A SINGLE
PROCESSOR
CAN PROCESS
OVER

19

THOUSAND
TRANSACTIONS
PER MONTH



SMART™

Service Management Accounting Reporting Tool

CB Tech's on-demand innovative solution to manage the complete life cycle of managed service delivery.

DOMINATING YOUR **WORK FLOW**

Our management model is founded on Exceptions Management. Its process allows for quick identification and notification of exceptions, resulting in a timely resolution. SMART™ also utilizes extensive automation to maximize work order flow efficiency and effectiveness.

As a result, CB Tech achieves more with less through technology, in cost savings that positively hit the bottom line. It allows us to shorten the response time for customer requests, culminating in improved levels of customer satisfaction.

360° **VIEW OF FIELD**

Automated acknowledgments and notifications keep customers well informed throughout the SMART™ process. The application ensures our clients stay in complete compliance with Strategic Defense & Xtreme Clean services.

The standardized processes and procedures developed by CB Tech is tailored to each specific client. This approach has proven to be the winning edge, in thousands of tasks successfully performed by our software everyday.

SERVICES MANAGED IN ONE APP

- Network Management
- Compliance Management
- Quality Assurance
- Accounts Payable Management
- Customer Master Maintenance
- Program Requirements Document (PRD)
- Key Performance Indicators (KPI)
- Work Order Flow Management
- Service Delivery Management
- Service Agreement Compliance
- Insurance Compliance
- Certification and Licensing Compliance
- Safety Compliance
- Security Compliance
- Strategic Facility Maintenance Fulfillment
- Analytical Data



SMART™ WORK ORDER FLOW





DASHBOARD



SMART

Service Management Accounting Reporting Tool

Tuesday, October 23, 2019 0:419 PM Log Out

Home Dashboard Customer Center Work Order Center Dispatch Center Comm Center Request Center Affiliate Center Financial Center Report Center Admin Center Route Center Project Center CMX Center Help Desk HR Center

◀ Oct 2019 ▶

Display Work Order Status for: **All Service Types Combined** Refresh Export

Total Work Orders	Aug	Sep	Oct
Total Work Orders	16,127	16,129	16,131

Work Order Status	Aug	Sep	Oct
Pending Dispatch - Affiliate Not Assigned	0 0%	0 0%	0 0%
Pending Dispatch	0 0%	0 0%	0 0%
Pending Acceptance	72 0%	18 0%	54 0%
Pending Re-Dispatch	0 0%	0 0%	0 0%
In Progress	8460 52%	9075 56%	9713 60%
Waiting for Completed Work Order	19 0%	2853 18%	1072 7%
Work Order Complete	7450 46%	4100 25%	5231 32%

Interactive Dashboard allows for real-time work order flow management and is designed to expose any exceptions.

- Flexible filtering selections allow for easily monitoring of specific business segments.
- Extensive multiple level drill-downs allows for quick access to the details.
- Easily monitor and manage all aspects of managed service delivery.
- Visibility is key to successful service delivery management. Managers are able to easily identify, manage, and resolve the exceptions.

COMMUNICATION CENTER



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Communications (17) Out of Balance (0)

Service Type: **All Service Types** Refresh

Document Type: **All Documents**

Company Name	Date Received	Document Type	Sent From	Attach	Work Order Process Date	Work Order Process User	Invoice Process Date	Invoice Process User	Lock Date	Lock User
Select SLM Waste and Recycling Services Inc	03/03/2017 12:56 PM	Invoices	Elena	2					03/13/2017 01:59 PM	Tiffany
Select Allshred Services	03/07/2017 05:21 PM	Invoices/Work Orders	Stacey	1					03/08/2017 09:30 AM	Tiffany
Select Fish-Elk Grove	03/15/2017 09:31 AM	Invoices	Company Fax	1	03/15/2017 04:49 PM	Tiffany	03/15/2017 04:50 PM	Tiffany		Complete
Select EverGreen Facility Services	03/15/2017 09:41 AM	Invoices/Work Orders	ANNETTE	1						

The Communication Center is the heartbeat of the system where all communications are received, managed, distributed, processed, and stored. Diligently working 24/7/365.

- The Communication Center's receives and manages inbound e-mails and faxes which contain a variety of attached document types. Completed work orders, affiliate invoices, proof of service, certificates of insurance, and W9s are some of the document types.
- Based upon the document type, communications are easily routed to the correct center for processing or simply filed.
- The Communication Processing Center allows for easy indexing and the application of additional data.

REQUEST CENTER



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Service Requests (9)

View:
 Service Request Type(s):
 Search Mail Subjects:

Company Name	Description	SR Type	SR Priority	Date Received	Tasking Start Date	Tasking Completion Date	Standard Tasking Duration	Standard Tasking Duration	Due Date	Sent From	Attach	Lock Date	Lock User	Assigned To
Select 1st Retail	WEB-1357267 - BBW-2333 - B-3 - Asheville Outlets	Service Request	0	09/15/2016 03:45 PM	9/19/2016 1:22:22 PM		20 minute(s)				0	12/02/2016 04:05 PM	Maria	Maria View Reassign
ABC	ABC Company-	QR1		01/05/2017	3/1/2017		110					03/01/2017	Maria	

The Request Center is the core of CB Techs’ customer service management model which manages the complete life cycle of a service request.

- Any type of service request may be received into the Request Center where they are identified and assigned.
- Requests are quickly and easily created from Service Request Templates with predefined tasks.
- Visibility and follow up are critical for success service request management. The Request Dashboard insures that all follow ups and tasks are easily tracked and managed.
- The Request Center tracks critical dates, milestones, tasks, follow ups, and notes.
- Automated acknowledgements and notifications are critical to customer communications and satisfaction.

WORK ORDER GENERATION



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Work Order

Work Order:	<input type="text" value="SRC-10003"/>	Service Date:	<input type="text" value="07/28/2014"/>
Issue Date:	<input type="text" value="07/24/2014"/>	Service Time:	<input type="text"/>
Status:	<input type="text" value="Work Order Complete"/>	Service Type:	<input type="text" value="Janitorial"/>
Active:	<input type="text" value="ACTIVE"/> <input type="button" value="View"/>	Service Item:	<input type="text" value="Daily-Weekly Janitorial Services"/>
Cancel Reason:	<input type="text"/>	Service Item Code:	<input type="text" value="Daily-Weekly Office Cleaning"/>
A/R Status:	<input type="text" value="A/R Complete - Advance Bill"/>	Service Frequency:	<input type="text" value="Daily-Weekly"/>
A/R Active:	<input type="text" value="ACTIVE"/>	Work Order Type:	<input type="text" value="Preventive Maintenance"/>
A/R Close/Complete Reason:	<input type="text"/>	Internal Work Order:	<input type="checkbox"/>
A/P Status:	<input type="text" value="A/P Complete"/>	Transaction Type:	<input type="text" value="Project Management:Janitorial"/>

The Work Order Generation can quickly generate thousands of work orders in a matter of a few minutes.

- Once generated these work orders are available for dispatching in the Dispatch Center.



DISPATCH CENTER



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Retrieve Dispatch

Service Type: Janitorial
 Affiliate: All Affiliates
 Customer: All Customers
 End User Code:

Date Type: Issued
 Issue Date Range: 10/1/2018 To 10/31/2018
 Dispatch Status: Dispatched
 Use Test Mode:
 e-Mail:

Select All

ABM Janitorial (28 Work Orders)
 Albuquerque Janitorial (9 Work Orders)

Dispatch	Issue Date	Work Order	Location #	Dispatch Status	Dispatch Date	Label
<input type="checkbox"/>	10/01/2018	SDXACL-10923	21945001	*REQUEST	12/27/2016	
<input type="checkbox"/>	10/01/2018	SDXACL-1093	21945001	*REQUEST	12/27/2016	
<input type="checkbox"/>	10/01/2018	SDXACL-111-1	21945001	*REQUEST	02/28/2017	
<input type="checkbox"/>	10/01/2018	SDXACL-113-1	21945001	*REQUEST	02/27/2017	
<input type="checkbox"/>	10/01/2018	SDXACL-111-1-2	21945001	*REQUEST	02/28/2017	

Manages the dispatching of service requests to CB Techs' affiliate network.

- All service request types are easily dispatched in an efficient manner by service type, affiliate, customer, and/or end user code.
- The Dispatch Center allows for initial dispatching as well as re-dispatching as needed.
- The affiliate receives an e-mail containing a link to the Affiliate Portal where the affiliate can accept or reject service requests and then download accepted work orders.

CUSTOMER CENTER



SMART

Service Management Accounting Reporting Tool

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Customer Division Location New Edit

A1 Industrial
 A2Z Insurance
 AAA Manufacturing
 ABC Insurance
 ABC Retail
 BBB Distribution
 BD Restaurants
 C&B Services
 C&C Rentals
 CB Tech
 CCC Bank
 DDD Manufacturing
 DEF Retail
 DK SuperStores
 EEE Insurance
 G&G Supplies
 GG Financial
 GHI Retail

Customer: JB Enterprises Customer ID: 75

Contact: SN

Phone: 919-530-7807 Fax:

e-Mail: son@abc.com URL:

Projects Documents Notes Invoices Addresses Contacts Activity

Show Inactive New

Status	Project Name
Select ACTIVE	ABC Jacksonville NC

The Customer Center manages customer information, project specifications, historical transactions, documents, and notes.

- The Customer Center easily manages customers with multiple divisions, locations, and projects.
- Historical data includes work orders, invoices, documents, notes, and activities.

AFFILIATE CENTER



SMART

My tasks: 16 SR(s) Active

Service Management Accounting Reporting Tool

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Home Dashboard Customer Center Work Order Center Dispatch Center Comm Center Request Center Affiliate Center Financial Center Report Center Admin Center Route Center CB Tech

Affiliate Servicing

- Fire Fighter and Detect Alarm
- Fire Fighter Sales and Service, Inc
- Fire Guard of Mississippi Inc.
- Fire Guard, Inc
- FIRE HOUSE
- Fire Mak Inc
- Fire One
- Fire Pro LLC
- Fire Pro Sales & Service, Inc
- Fire Pro Sales and Service, Inc.
- Fire Pros Inc
- Fire Protection and Safety
- FIRE PROTECTION PRODUCTS, INC
- Fire Protection Service
- Fire Protection Specialist LLC
- Fire Safety and Equipment IV Inc
- Fire Safety Products Inc.
- Fire Safety Sales Co. Inc
- Fire Safety Systems, Inc.
- Fire Safety Technologies, LLC.
- Fire Services of Idaho Inc
- Fire Services Plus Inc.
- Fire Tech Systems, Inc.

Affiliate: Fire Detect Affiliate ID: 1632 New Edit

Service: Janitorial Phone: (502) 957-1810

Address: 564 S. Main Fax:

City: Louisville Dispatch: EMAIL

State: KY **Zip:** 40229 Status: ACTIVE

Contact: 502 774-4466

e-Mail:

[Work Orders](#) [Invoices](#) [Services](#) [Documents](#) [Notes](#) [Addresses](#) [Contacts](#) [Activity](#)

View	Document Type	Received	Expiration	Description
View	Work Order & Payment Terms Acknowledgement	09/17/2019		
View	New Vendor Profile	09/17/2019		
View	W9	09/17/2019		

The Affiliate Center manages affiliate information, project specifications, historical transactions, documents, and notes.

- The Affiliate Center easily manages multiple affiliate projects.

WORK ORDER CENTER



SMART

Service Management Accounting Reporting Tool

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Home Dashboard Customer Center Work Order Center Dispatch Center Comm Center Request Center Affiliate Center Financial Center Report Center Admin Center Route Center Project Center CMX Center Help Desk HR Center

Work Order Cost Customer Affiliate Notes Activity Rating(s) Save Close

Work Order: SRC-10003

Issue Date: 07/24/2014

Status: Work Order Complete

Active: ACTIVE View

Cancel Reason:

A/R Status: A/R Complete - Advance Bill

A/R Active: ACTIVE

A/R Close/Complete Reason:

A/P Status: A/P Complete

A/P Active: ACTIVE

A/P Close/Complete Reason:

Manual Work Order Reason: PM Not Generated

Service Date: 07/28/2014

Service Time:

Service Type: Janitorial

Service Item: Daily-Weekly Janitorial Services

Service Item Code: Daily-Weekly Office Cleaning

Service Frequency: Daily-Weekly

Work Order Type: Preventive Maintenance

Internal Work Order:

Transaction Type: Project Management:Janitorial

Process Date: 07/28/2014 11:29 AM

Process User: John Hart

The Work Order Center manages work order information, historical information, documents, and notes.

- Individual work orders can be easily created and dispatched in a single transaction.



FINANCIAL CENTER



SMART

Service Management Accounting Reporting Tool

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User: RC New

Workorders	Batch #	Batch Date	Client	Division	Work Orders	Export Date	Change Date	Export	Open	Approve	Delete
	12473	10/23/2018	Janitorial		736						
	12474	10/23/2018	Waste Management		664						

The Invoice Management insures that invoices are batched, reviewed, and approved in an efficient manner. Communicates seamlessly with your current Financial Management Systems

- Billing schedule • Billing history • Invoices by date
- Payables history • Invoice approval • Invoice approval history
- Supporting billing files are created and exported as Excel spreadsheets for importing into our customer's financial systems.
- Approved invoices are interfaced into the Financial Management System.
- Customer invoices and billing files are automatically generated on customizable billing schedules.
- Provides historical and analytical reporting data.
- **SMART's simple, but powerful management interface requires no additional accounting support. >**

SMART - A/P & A/R Processing

Tuesday, March 24, 2020 Test AR Hist

Receivables Payables **QB Interface** History Errors Recreate Scheduled

QB Interface

- Pre-Process Invoice Classes
- Pre-Process Invoice Line Classes
- Pre-Process Invoice Items
- Process Invoices
- Process Billing History
- Pre-Process Payables Line Classes
- Pre-Process Payables Items
- Process Payables
- Process Payables History
- Process Payables Payments
- Process Payables Payments - C
- Update Smart A/P Payments

SMART-APAR X

Process QB Interface Complete

REPORT CENTER



SMART

Service Management Accounting Reporting Tool

Log Out

Home Dashboard Customer Center Work Order Center Dispatch Center Comm Center Request Center Affiliate Center Financial Center Report Center Admin Center Route Center Project Center CMX Center Help Desk HR Center

My Reports Report Data

Select	Report Names	Category	Subcategory	Last Run By	Last Run Date
	A/P Cancel Report	Work Orders	Work Orders	Randy Conway	Aug 4 2015 12:57PM
	A/P Holds	Vendors/Affiliates & Payables	Billing	Adam Kiger	Aug 6 2015 1:34PM

The Report Center offers a variety of standardized reports:

- Compliance Management and Reporting • End User Weekly Reporting • End User Monthly Reporting
- Historical Reporting • Analytical Reporting • Activity Reporting
- The Report Center allows for quick creation of dynamic end user reports and graphs.
- Reports and graphs can be executed and emailed on a flexible scheduled basis.
- Reports can be generated across the Subcontractor Service Management System.

AUDIT MANAGEMENT



SMART

Service Management Accounting Reporting Tool

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[Home](#) [Dashboard](#) [Customer Center](#) [Work Order Center](#) [Dispatch Center](#) [Comm Center](#) [Request Center](#) [Affiliate Center](#) [Financial Center](#) [Report Center](#) [Admin Center](#) [Route Center](#) [Project Center](#) [CMX Center](#) [Help Desk](#) [HR Center](#)

[PDF](#) [Attachments](#) [Delete](#) [Save](#) [Close](#)

Affiliate Name: AR Destruction
Address: 67 4th Street
City/State/Zip: Dublin, Oh 43016
Contact Name: Gary
Contact Phone: 614 877-5332
Contact e-Mail: sdavi@gmail

Audit Type: DM Audit version 2-07-15-2019
Audit By: SD
Audit Date: 10/22/2014
Total Points: 96 / 98
Percent: 97.96%

[Information](#) [Audit](#) [Action Plan](#)

	Yes/No	Possible Points	Earned Points	Note
1 Licensing/Operating Status				
a. Valid business operating license (attach copy - verify effective date and city/state)	YES ▼	2	2	Note

Audit Management provides a centralized repository for the creation, management, and storage of audit reports.

- Affiliate audits are an essential component of CB Techs' Compliance Management program.
- CB Techs' Audit Report consists of a series of weighted audit items, supporting photos and documents.

AUDIT MANAGEMENT - ATTACHMENTS



SMART

Service Management Accounting Reporting Tool

Log Out ●

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[Add Attachments](#) [Close](#)



Baler

[Save](#)
[Delete](#)



Conveyor

[Save](#)
[Delete](#)

Supporting photos and documents are easily labeled and attached to the audit report.

- The finished audit report is exported to a PDF for distribution.
- Audit Management supports an infinite number of audit report types with associated questions and weighting which allows the Audit Management to be used to audit other areas of the business.



JOB COSTING/TIME SHEETS

Employees enter their time sheets weekly by customer, project, and activity.

- Time sheets are automatically interfaced into the Financial, Payroll, and Job Costing systems.
- The Job Costing/Time Sheets Management system can be used in other areas of the business.

Time Sheet Entry

Employee:	RC
Work Date:	02/08/2016
Customer:	STC Hospital Group
Project:	Account Management
Division:	All Divisions
Location:	All Locations
End User:	All End Users
Activity:	Account Management
Description:	

COMPLIANCE MANAGEMENT

Insurance Compliance is managed through an automated renewal notification system that notifies the affiliate 90, 60, and 30 days in advance of their insurance expiration.

- The affiliate simply submits their COI to the Communication Center where it is processed and saved.
- Insurance coverages, limits, and expiration dates are managed in the system.
- Subcontractor agreements are managed in the system.
- The Compliance Report lists all affiliates and rates them based upon their NAID Certification, Insurance, and Agreement compliance.



CUSTOMER PORTAL

Provides visibility to the customer.

- Customer configurable location hierarchy.
- Allows the customer to manage their portfolio.
- Submit and manage service requests.
- View past and future service schedules.
- View and download work orders and invoices.
- View and download Certificates of Destruction.
- Reports and graphs.
- Messages and notifications such as marketing



AFFILIATE PORTAL

Accept and manage work orders.

- Submit completed work orders.
- Submit Certificates of Destruction.
- Submit and process bills.
- Submit all types of documents such as COI, W9, agreement, etc.
- View past and future service schedules.
- Reports and graphs.
- Messages and notifications.



SERVICE TECHNICIAN PORTAL

Complete work orders on-line.

- Bin types
- Quantity
- Technician's signature
- Customer's signature
- Automatically process the work order for customer invoicing.
- Automatically generate and store the Certificates of Destruction.
- Provide detailed service instructions.



DATA EXPORT / IMPORT

Customer invoices.

- Affiliate bills.
- Employee Job Costing/Time Sheets.
- Reports can be generated across the Subcontractor Service Management System.
- Virtually all data can be exchanged/synchronized between the systems.



SMART™ TECHNOLOGY BENEFITS

COMPETITIVE ADVANTAGE IN THE NATIONAL ACCOUNTS MARKETPLACE.

- Your competition does not have the tools to efficiently and effectively manage subcontractor service delivery in house.
- Self-sufficiency provides ability to grow and expand as business dictates.
- Eliminates a layer of risk while providing total direct control of all service delivery.
- Ensures customer service continuity.
- Scalability provides the ability to grow while controlling costs.
- Customer Portal provides invaluable real-time information to your customers.

REDUCED MANAGEMENT COSTS

- Exceptions Management
- Dashboard Real-Time Visibility
- Automated Scheduled Reporting
- Automated Compliance Management
- Extensive Automation

IMPROVED CUSTOMER EXPERIENCE

- Customer Portal
- Real-Time Information
- Service Request Management
- Automated Customer Acknowledgements and Notifications

BUSINESS FUNCTIONALITIES

- Vital information to make critical business decisions
- System components can be utilized to manage other aspects of the business

AUDIT MANAGEMENT

REPORTING CENTER

JOB COSTING/TIME SHEET MANAGEMENT

ABOUT CB TECH AND THE HALL OF FAME OWNERSHIP

Cris Carter is chairman for CB Tech and Pro Football Hall of Fame class of 2013. As chairman, Cris leads one of the nation's top integrated facility management firms specializing in project and program management. The award-winning company serves clients throughout the country and has relationships with many of the nation's blue chip corporations.

Jeff Davis has overseen the strategic direction and daily operations since 1998. With a combined workforce of over 75,000 self-performed and certified affiliate service providers across the United States, Canada, and Puerto Rico, CB Tech is a leading provider of managed services. Jeff's growth strategy included obtaining certification as a Corporate Plus® Member with the National Minority Supplier Development Council (NMSDC) and a member of the Ohio Minority Supplier Development Council (OMSDC). **He is also a combat veteran of the U.S. Army Airborne Rangers.**

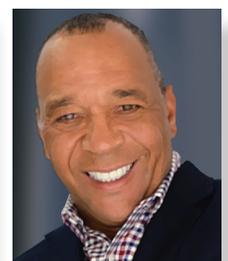


CB TECH AT A GLANCE

- CERTIFIED MINORITY
- VETERAN OWNED
- EXPERIENCE
- TECHNOLOGY
Service Management Account Reporting Tool (SMART)
- COVERAGE
- MULTIPLE SERVICE PROVIDERS NATIONWIDE
We have the ability to replace, if needed, an affiliate with another local affiliate without any interruption of service, pricing, contract.
- FLEXIBLE
- PERSONAL TOUCH
- CUSTOMIZABLE
- NATIONAL ACCOUNT EXPERIENCE
Brought to local level
- LOCAL ECONOMIC GROWTH



Cris Carter
CB Tech Chairman



Jeff Davis
CB Tech CEO & Vice Chairman



CBtech

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