

Sample deliverable: Build & Run

Platform plan and month 3 operations report

Copperline Mechanical. A 40-person HVAC contractor running dispatch on spreadsheets and a whiteboard.

Prepared by Shipwright Labs, October 2026

Sample deliverable prepared for a fictional client. Names, figures, and findings are illustrative.

Contents

-
- 1 Summary
 - 2 Scope
 - 3 How it runs
 - 4 Delivery plan
 - 5 What the subscription covers
 - 6 Month 3 operations report
-

1 Summary

Copperline Mechanical books around 600 service calls a month across residential and light commercial customers. Jobs are taken by phone, typed into a shared spreadsheet, and assigned on a whiteboard in the shop. Technicians call in for their next job, and invoices are re-keyed into QuickBooks at the end of each week.

We will build Copperline a dispatch platform that replaces the spreadsheet and whiteboard: one place to take a job, assign it, track it in the field, and turn it into an invoice. We host it, secure it, back it up, and keep improving it for one monthly subscription.

6 weeks

From kickoff to launch

\$2,400/mo

Subscription, build included

12 months

Minimum term

10 hours

Feature work every month

2 Scope

Who uses it

Role	People	What they do in the platform
Office staff	4	Take calls, create jobs, look up customer and equipment history
Dispatchers	2	Assign and reorder jobs on the dispatch board, see who is where
Field technicians	28	See their day on a phone, update job status, add notes and photos, capture a signature
Owner and bookkeeper	2	Review completed jobs, approve invoices, see weekly numbers

Version 1 features

- Job intake with customer, site, and equipment history
- Dispatch board by technician and day, with drag-to-reassign
- Technician phone view: today's jobs, directions, status updates, notes, photos, signature
- Completed jobs become draft invoices in QuickBooks Online
- Import of existing customers and equipment from the current spreadsheets

Not in version 1

- Payroll and timesheets (stays in the current payroll provider)
- Parts inventory
- A customer-facing booking app

These can be added later using the monthly feature hours.

3 How it runs

- **Office and field staff**
Sign in from any browser or phone with individual accounts
- **Copperline dispatch app**
Hosted on Cloudflare, served over HTTPS only
- **Managed PostgreSQL database**
Encrypted at rest, daily backups kept 30 days
- **QuickBooks Online**
Completed jobs sync as draft invoices every 15 minutes
- **Monitoring**
Around-the-clock uptime checks with alerts to Shipwright Labs

Who owns what

Copperline owns its data. On request, or at the end of the agreement, we deliver a full export of customers, jobs, and invoices in standard formats.

4 Delivery plan

We build in three 2-week cycles. At the end of each cycle Copperline's team uses what was built and tells us what to change.

Cycle	Weeks	What gets built	Milestone
1	1 to 2	Customer and equipment import, job intake	Office staff enter new jobs in the platform
2	3 to 4	Dispatch board, technician phone view	Dispatch runs in the platform; the whiteboard retires
3	5 to 6	QuickBooks sync, training, launch support	Go-live: invoices flow to QuickBooks without re-keying

5 What the subscription covers

Item	Included
Price	\$2,400/month, build included
Term	12-month minimum
Hosting	Cloudflare application hosting and a managed PostgreSQL database
Monitoring	Around-the-clock uptime monitoring with alerts
Security updates	Critical patches within 2 business days; routine updates monthly
Backups	Daily, kept 30 days
Support response	Next business day; urgent outages within 4 business hours
Feature work	10 hours per month for fixes, changes, and new features

6 Month 3 operations report

Each month Copperline receives a one-page report like this one, covering the third month after launch.

99.97%

Uptime

6

Releases shipped

14

Support requests
resolved

9.5 of 10

Feature hours used

What shipped

- Technicians can attach up to 10 photos per job (requested by the service manager)
- Dispatch board shows each technician's last known location
- Faster QuickBooks sync for jobs with many line items

Incidents

One 12-minute outage on the 14th during a database provider maintenance window. Alerts fired within 2 minutes; no data was lost.

Next month

- Maintenance agreements: recurring tune-up jobs created automatically
- Weekly revenue summary emailed to the owner every Monday