



EZ4YouTech.com

Close estimates and follow up faster

AI tools for HVAC, plumbing, and trade teams: estimate explainers, follow-up, and client email in one workflow

About 8 minutes of slides · Three live demos on the platform (~7 minutes)



Presented by: Mohd Naeem, Founder & CEO

25+ years in development, architecture, and DevSecOps. Enterprise experience, built for small business teams

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Agenda

What we will cover in the next few minutes

Section	Topics	Time
1	Problem · What we built · Keep what works · Sound familiar · How it works	~3 min
2	Three walkthroughs: Estimate · Reminders · Bulk Email (scenario, solution, demo on each slide)	~8 min
3	Common questions · Pilot · Pricing · Why trust us · AI Platform tech stack	~4 min
4	Your next step · Q&A	Open



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AI MADE EASY FOR YOUR BUSINESS

The problem

Tackle the daily work that slows you down

AI built for your industry

- ✓ We augment your existing tools (dispatch, estimating, and invoicing software). We do not replace them.
- ✓ Estimates, follow-ups, and dispatch notes in clear steps, not a blank ChatGPT tab
- ✓ Same workflow every time. Enter facts once, move to the next step. No re-typing between apps
- ✓ Human review before every send. Drafts only, not autopilot.

What we solve

Time · Money · Priority

- ✓ Time: hours back on estimate explanations and cold-quote follow-up
- ✓ Money: jobs won when homeowners understand the quote and hear back quickly
- ✓ Priority: finish office work that piles up while techs are in the field



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What we built

One login, home services apps, and everyday business tools

Your company workspace

- ✓ One business account
- ✓ Home services industry chosen once
- ✓ Team logins by plan

Home Services Apps

- ✓ Estimate explainers and service follow-up
- ✓ Work orders, dispatch handoff, maintenance plans

Everyday Tools

- ✓ Client Relationship Reminders and Bulk Email Processor
- ✓ Documents and seasonal campaigns

How It Feels After the Estimate

- ✓ Open Explain an estimate, run step one, tap Continue. The next app opens with your draft.
- ✓ Estimate Explainer, Service Follow-Up, and AI Email Automation: same path every job
- ✓ Your admin connects your AI account once (OpenAI, Together, Groq, xAI, and more)
- ✓ We augment your existing tools (dispatch, estimating, and invoicing software). We do not replace them.



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AI MADE EASY FOR YOUR BUSINESS

Keep what already works

Your existing tools, plus a writing and email layer

Your dispatch & field tools

Schedules, work orders, and tech notes stay where they are

Estimate & invoicing software

Your pricing tools and homeowner portals

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Plain-language estimates, follow-up, and email. Same path each time.

We augment your existing tools (dispatch, estimating, and invoicing software). We do not replace them.

Homeowners Understand · Quotes Close Faster · Less Office Typing



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AI MADE EASY FOR YOUR BUSINESS

Sound familiar?

Many offices paste estimate lines into ChatGPT and still re-type every homeowner email

Free ChatGPT or Copilot

- ✗ Open a blank chat and explain the repair every estimate
- ✗ Copy explanation, follow-up, and client email in separate steps
- ✗ **Free ChatGPT or Copilot may use your prompts for training and model improvement**
- ✗ **You are tied to one provider and one personal account**

With EZ4YouTech.com

- ✓ One estimate workflow: same steps every time with Continue
- ✓ Explain an estimate: Estimate Explainer, Service Follow-Up, AI Email Automation
- ✓ **Your company workspace and your AI accounts. We do not train on your client data**
- ✓ **Your admin connects your provider once: OpenAI, Together, Groq, xAI, and more**



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AI MADE EASY FOR YOUR BUSINESS

How it works

Three steps for your team. No IT project required.

1

Connect once

- ✓ Your admin links your company's AI account once
- ✓ The whole office shares one secure workspace

2

Explain an Estimate

- ✓ Estimate Explainer → Service Follow-Up → AI Email Automation
- ✓ Tap Continue between steps. Same path every job.

3

Try free

- ✓ 2-month pilot with platform fee waived
- ✓ Test on real estimates before you decide

You pay your AI provider directly. Our fee covers the apps and workspace, not your token usage.



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Walkthrough 1: Explain an Estimate

Scenario 1

The homeowner does not understand the line items. The quote goes cold.

- ✗ Repair lines need plain English before the customer says yes.
- ✗ Open quotes sit for days with no follow-up email drafted.
- ✗ Dispatch notes never make it into a clear homeowner message.

Solution 1: Estimate Workflow

Three steps, same path every job.

- ✓ 1 · Estimate Explainer: Plain-language estimate explanation
- ✓ 2 · Service Follow-Up: Follow-up email draft for cold quotes
- ✓ 3 · AI Email Automation: Send homeowner email or copy to Outlook

Explain the estimate, draft follow-up, and send or paste into your tools in minutes.

Demo 1: Explain an Estimate

Live on the platform · About 3 minutes · Starter plan and above

- ✓ Open Explain an Estimate
- ✓ Estimate Explainer, Service Follow-Up, AI Email Automation
- ✓ Tap Continue between steps. Same path every job.



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Homeowners Understand · Quotes Close Faster · Less Office Typing



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Walkthrough 2: Client Follow-Up

Scenario 2

Birthdays and anniversaries slip when daily estimate work stacks up.

- ✗ You mean to send birthday notes, but client work wins every week.
- ✗ Each email is written from scratch or copied from an old template.
- ✗ Your CRM has the dates. Turning them into send-ready drafts still takes time.

Solution 2: Client Reminder Workflow

Three steps from CSV to sent email.

- ✓ 1 · Upload CSV: Rows ready for draft generation
- ✓ 2 · Review Drafts: Edit anything before you approve
- ✓ 3 · Send: Send approved emails from your account

Review drafts, send all due reminders, or set auto-send and forget the follow-up pain.

Demo 2: Client Reminders

Live on the platform · About 2 minutes · Growth plan and above

- ✓ Open Client Relationship Reminders
- ✓ Upload your client CSV and review draft emails.
- ✓ Approve and send from Microsoft 365.



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Stay in Touch · Clients Feel Remembered · Less Manual Typing



Walkthrough 3: Inbox Backlog

Scenario 3

Saved emails and replies pile up faster than you can write them.

- ✗ Leads and client threads wait in your inbox or saved folder.
- ✗ Starting each reply from scratch eats the hour you needed for client work.
- ✗ Copy from ChatGPT still means paste, fix tone, and send one at a time.

Solution 3: Bulk Email Workflow

Three steps from inbox to sent replies.

- ✓ 1 · Import: Messages queued for drafting
- ✓ 2 · Review Drafts: Edit any message before you approve
- ✓ 3 · Send: Send from Microsoft 365

Batch draft replies, approve once, send from your inbox.

Demo 3: Bulk Email

Live on the platform · About 2 minutes · Full plan and above

- ✓ Open Bulk Email Processor
- ✓ Upload saved emails or sync inbox, review AI drafts
- ✓ Approve the batch and send.



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Clear the Backlog · Faster Replies · Less Copy-Paste



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Common questions

Plain answers we give owners and office managers

Already using ChatGPT?

- ✓ Same estimate workflow every job, not a blank chat each time
- ✓ Steps connect in one company workspace, not personal chats

Why another subscription?

- ✓ Our fee covers apps and workspace, not AI usage
- ✓ You pay your provider directly; 2-month pilot waives platform fee

We have dispatch software

- ✓ Keep those tools. We finish estimate explanations and email
- ✓ Paste our drafts into your dispatch or CRM as you do today

Which plan fits us?

- ✓ Starter: Setup admin + up to 2 app users
- ✓ Growth: up to 5 users · Full unlocks Bulk Email Processor



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Plans and Founding Rates

Free 2-month pilot · Founding rates for our first 50 customers

Plan	Regular	Founding	Team
Starter (Basic)	\$39	\$29	Admin + up to 2 app users
Growth (Standard)	\$59	\$49	Up to 5 app users
Full (Elite)	\$119	\$99	Up to 10 · Bulk Email Processor included
Enterprise	From \$199	From \$149	Up to 25 · contact us

AI usage is billed by your provider, not included in the platform fee.
Yearly billing saves one month · See ez4youtech.com/pricing

Try free for 2 months

- ✓ Platform fee waived on Starter, Growth, or Full
- ✓ We help your admin connect AI once
- ✓ Run all three live demos on real work
- ✓ Founding rates lock for early adopters



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AI MADE EASY FOR YOUR BUSINESS

Why trust EZ4YouTech.com

Built by a cloud developer and architect for small business teams

Founder credibility

25+ years in development,
Architecture and
DevSecOps, now for SMB.

Your data stays yours

Your AI accounts, your
rules.
We do not resell prompts.

Real apps, not chat

Clear steps each day.
Tap Continue to open the
next app.

Start small

Try free first, then add users
and apps when you are
ready.

Mohd Naeem, Founder & CEO | EZ4YouTech.com LLC | Frisco, TX | USA production platform live May 2026



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AI Platform Technology Stack

For Technical Audience · USA production posture · May 2026

Layer	Technology	Role
Edge and TLS	HTTPS	ez4youtech.com and aiplatformusa.ez4youtech.com
Application	FastAPI + Streamlit	REST API and agent or admin UI
Compute	Azure Container Apps	Health checks and tagged releases
Secrets	Azure Key Vault	JWT, encryption keys, Mongo URI
Database	MongoDB Atlas (M10)	Tenants and encrypted BYOS credentials
Storage	Azure Blob	tenant_id/ paths for documents
Email	AWS SES · Turnstile	Contact form delivery and CAPTCHA
AI routing	BYOS multi-provider	OpenAI, Together, Groq, xAI, and more

Enterprise-ready architecture. No SOC 2, ISO 27001, or HIPAA claims unless agreed in writing. Shared multi-tenant SaaS with logical isolation per tenant_id.

Full detail: ez4youtech.com/security.html#technology-stack



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Your next step

Book a walkthrough or try the platform on your next estimate

1

Book a 30-minute demo

ez4youtech.com/contact
or call us

2

Try it free

2-month pilot; we help
with setup

3

Run your next estimate

Explain an estimate on
the platform

4

Run it on real work

Explainer, follow-up,
email with Continue

30-minute demo · 2-month free pilot · connect@ez4youtech.com · +1 (214) 404-2319

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Q & A

Quick answers, then your questions

How is this different from ChatGPT?

- ✓ Same workflow every time. Steps connect with Continue. Work stays in your company workspace.

Do you replace our existing software?

- ✓ No. We augment your dispatch, estimating, and invoicing tools.

What about client reminders and bulk email?

- ✓ Client Relationship Reminders and Bulk Email Processor are on the platform today, on higher plans. We demo both live.

What does it cost after the free trial?

- ✓ Platform fee from \$29–\$99/mo founding rates; AI usage is billed by your provider separately.

Which plan fits a small team?

- ✓ Starter: Setup admin + up to 2 app users. Growth: up to 5. Full adds Bulk Email Processor for larger teams.

Is my client data safe?

- ✓ Your AI accounts and rules stay yours. We do not resell prompts. Your admin connects providers once.

How long does setup take?

- ✓ About 15 minutes for admin to connect AI once; office staff can run an estimate workflow the same day.

Still have questions? Ask us anything: connect@ez4youtech.com or book a 30-minute demo.



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Thank you

AI made easy for your business. Try free for 2 months.

Scan to book a demo or open the platform

Book a Demo



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