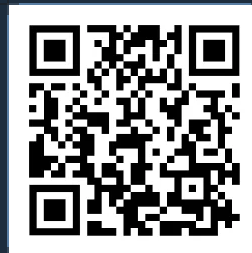




CLIENT WORK / 2025-2026

Transforming Home-Service Operations

Seven production systems built for HVAC and plumbing contractors – WhatsApp and Zapier automation, lead agents, field locating apps, invoice sync and automated reporting.



Scan for testimonial videos and everything we build.



Brandon Wong & Adrian Perez

Founders, Demystify AI & Data Flow Pros

contact@demystify-ai.org 310-938-6719



WHATSAPP + ZAPIER AUTOMATION LAYER

Shoutouts and Emails, delivered straight into the crew's WhatsApp Group Chat

One Zapier backbone reads the systems of record, formats the message, and posts it into the right WhatsApp chat. The Hustler Bot pushes real-time sales shoutouts; the Email Reader parses inbound job and estimate email into structured updates. What used to be a person screenshotting emails all day is now a pipeline.

STACK

Housecall Pro

WhatsApp Business

Zapier

Gmail / IMAP parsing

Google Sheets

OpenAI

WHAT IT DOES

- Posts every closed job and win as an instant shoutout, no manual screenshots
- Reads inbound email and turns it into a structured update for the crew chat
- Routes by team and role so leadership sees trends without asking
- Runs unattended, seven days a week

3,100+

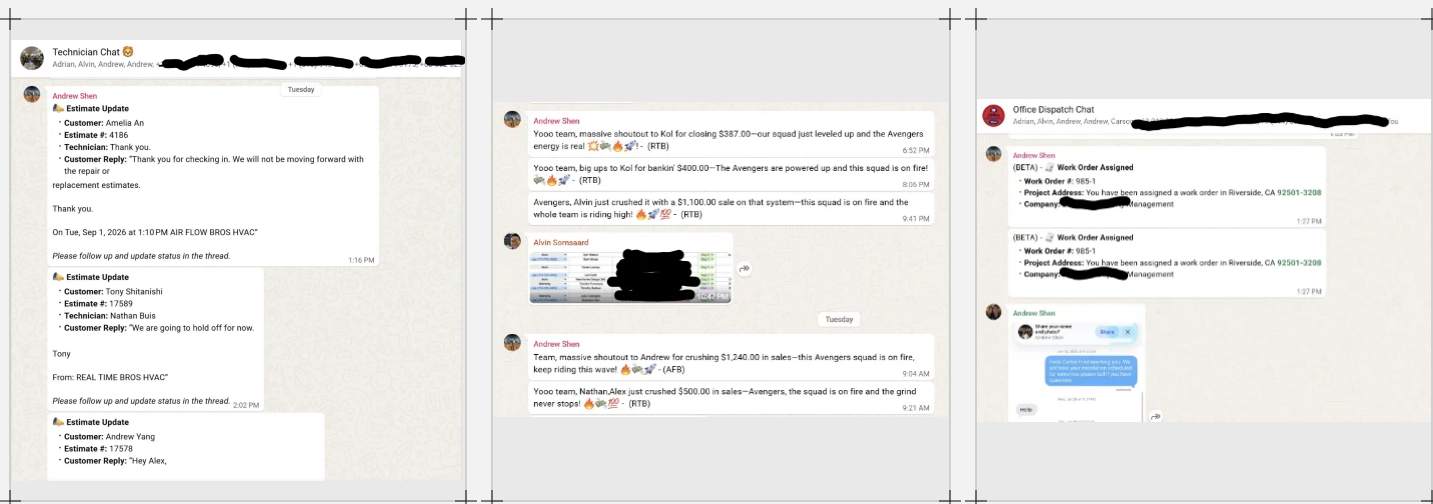
SHOUTOUTS GENERATED

6,700+

ZAPIER TASKS COMPLETED

"You guys changed my life, I no longer have to do shoutouts and screenshot emails and put them into the WhatsApp chats... you automated away my job."

ANDREW SHEN, CEO – REAL TIME BROS HVAC & AIRFLOW BROS HVAC





YELP LEAD AGENT – ENHANCED BUILD

Every Yelp lead answered in seconds, then works until it converts, schedules and enters customer in HCP

The original Yelp bot caught leads and pushed a templated first reply. The agent we rebuilt reads the conversation, writes a tailored response, asks the qualifying questions a dispatcher would, and keeps following up on its own until the lead books or closes out.

STACK

Housecall Pro

Yelp Leads API

Zapier

LLM agent loop

Google Sheets CRM

WhatsApp alerts

BOT → AGENT

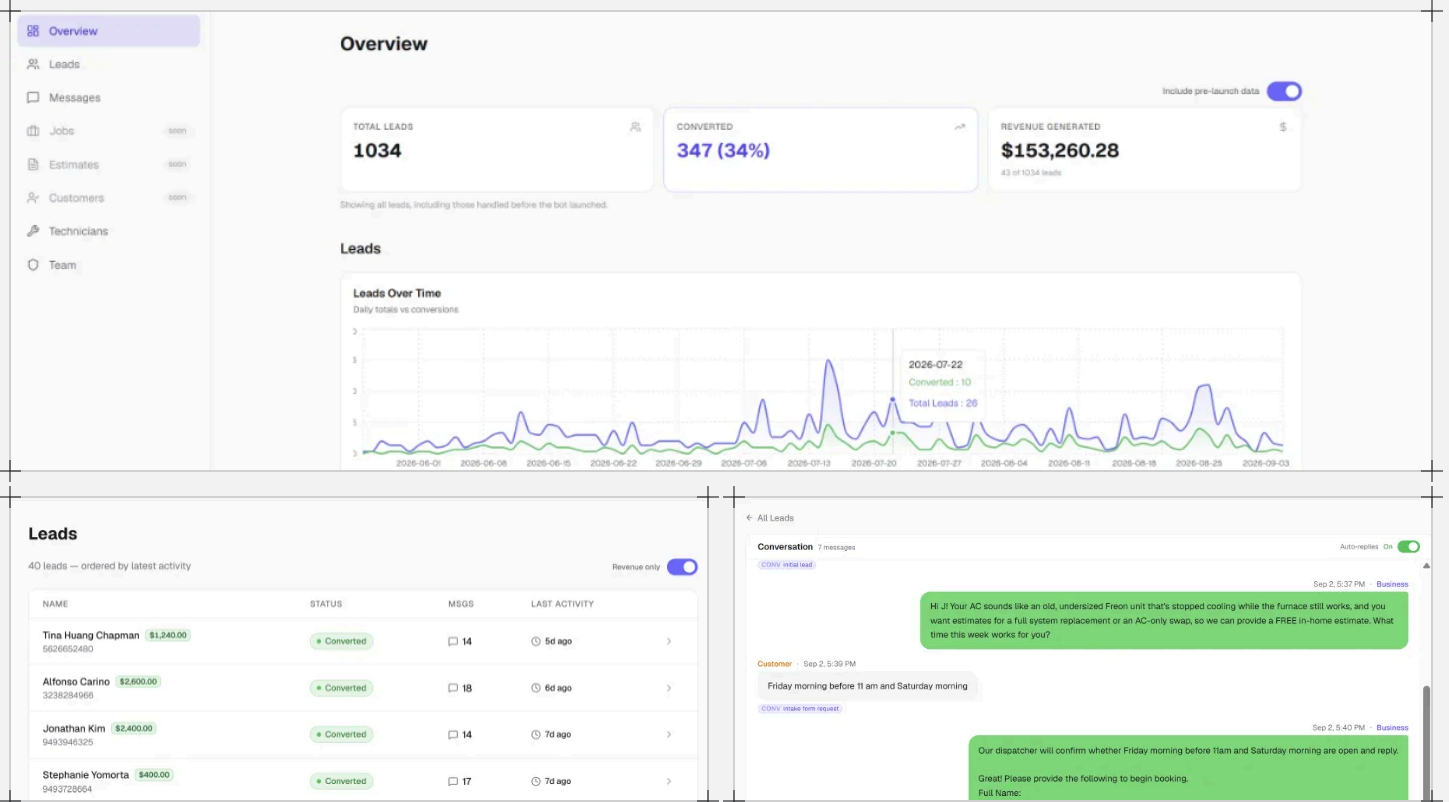
- Replies to new Yelp inquiries within seconds, day or night
- Qualifies the job – system, symptom, address, urgency – in conversation
- Multi-touch follow-up sequence instead of a single templated reply
- Logs every lead and outcome for pipeline review

1034

YELP LEADS PROCESSED

34%+

FOLLOW-UP RATE ON LEADS





EMAIL READER BOT – ESTIMATE FOLLOW-UPS

Estimates Followed up automatically, the minute a potential customer has a concern.

The Email Reader Bot parses estimate email as it lands, tracks which quotes are still open, and triggers the follow-up sequence on the ones going quiet. Dispatchers stopped reconciling inboxes by hand – 1 to 2 hours back per person, per day – and the revenue that used to sit in unread threads gets worked.

STACK

Housecall Pro

Gmail parsing

Zapier

Google Sheets

WhatsApp Business

WHAT IT DOES

- Reads every estimate email and extracts customer, job and amount
- Flags quotes with no response and starts the follow-up sequence
- Removes the manual inbox reconciliation dispatchers did each morning
- Fewer transcription errors than hand-entered notes

5–10 hrs

SAVED WEEKLY PER DISPATCHER

Daily

UNATTENDED RUN CADENCE

NEW New customer added to HCP – Real Time Bros HVAC

Leslie Yeh

[Redacted]
[Redacted]
[Redacted] - gated community access

- AC and furnace split system
- central AC thermostat reads correct temp; setting target temp does not turn on AC
- not generating hot or cold air
- no fee for diagnosis
- technician to write repair quote; cost depends on issue

Preferred: **2026-08-24 10AM**

https://pro.housecallpro.com/app/customers/cus_178d1911082a49f496c6f2622f70bbb2

Reply here to coordinate booking.

9:05 PM

Lead escalated: Leslie Yeh - Out of scope question

Leslie Yeh is asking whether the team can still come by Monday 8/24 at 10 AM, noting it is last minute and that the property is in a gated community.

Please respond here: <https://www.rtbops.com/leads/890>

9:05 PM

DIGITAL GAS RELOCATE FORM

A mobile friendly form for gas relocations, in place of the paper form

We built Mattucci a locating application in the mould of a site-tracker tool: crews submit a relocate request from the field on a digital form, the request is logged and routed immediately, and the office watches status in real time instead of chasing paper. Submissions run 24/7 and every run is auditable.

STACK

Custom web app

Replit

Zapier

Digital field forms

Automated PDF output

WHAT IT DOES

- Digital field form replaces the paper relocate packet entirely
- Submissions accepted around the clock, from any crew phone
- Instant visibility into every active request and its status
- Built to absorb 100+ runs a month as volume grows

120

DIGITAL WORK-FORMS PER MONTH

~1 hr

SAVED DAILY ACROSS 3 DEPTS

MATTUCCI
GAS RELOCATING

MATERIALS USED:	QTY:	RATE:	TOTAL:
IP Ball Valve - 1 1/4	3	\$60.00	\$180.00
90 Galv - 1 1/4"	6	\$8.82	\$52.92
Reduction 90 Galv - 1 1/4 x 1	1	\$11.07	\$11.07
Tee Galv - 1 1/4"	1	\$13.38	\$13.38

LOCATING																
Operator: Andrew Sandbrook		Start Date: 03/30/2018 End Time: 11:00 AM		Company: ZW		Personnel:										
Helper: ALBERT N		Total Hours: 30m		On-Site: 30m		Work Order: 1700208		Furniture Signature:								
#	Address	Make	Chimney	Flue	Street	Back Path	Curb	Location	Property Line	Front of Lot	Yard	Grid Type	Background	Notes	Day Meter	Estimated
1	140 YALE DR	9				6.1	7.1	6.1	DEEMED	CLUSTER	CLUSTER	CLUSTER	CLUSTER	CLUSTER	30	PM 9
NOTES									DEEMED ROOF	CLUSTER	CLUSTER	CLUSTER	CLUSTER	CLUSTER		COMPLT
2	140 YALE DR	9				6.1	7.1	6.1	DEEMED	CLUSTER	CLUSTER	CLUSTER	CLUSTER	CLUSTER	30	PM 9
NOTES									DEEMED ROOF	CLUSTER	CLUSTER	CLUSTER	CLUSTER	CLUSTER		COMPLT
3	140 YALE DR	9				7.1	6.7	7.1	DEEMED	CLUSTER	CLUSTER	CLUSTER	CLUSTER	CLUSTER	30	PM 9
NOTES									DEEMED ROOF	CLUSTER	CLUSTER	CLUSTER	CLUSTER	CLUSTER		COMPLT
4	140 YALE DR	9				7.1	6.7	7.1	DEEMED	CLUSTER	CLUSTER	CLUSTER	CLUSTER	CLUSTER	30	PM 9
NOTES									DEEMED ROOF	CLUSTER	CLUSTER	CLUSTER	CLUSTER	CLUSTER		COMPLT
5	140 YALE DR	9				6.1	7.1	6.1	DEEMED	CLUSTER	CLUSTER	CLUSTER	CLUSTER	CLUSTER	30	PM 9
NOTES									DEEMED ROOF	CLUSTER	CLUSTER	CLUSTER	CLUSTER	CLUSTER		COMPLT
6	140 YALE DR	9				6.1	7.1	6.1	DEEMED	CLUSTER	CLUSTER	CLUSTER	CLUSTER	CLUSTER	30	PM 9
NOTES									DEEMED ROOF	CLUSTER	CLUSTER	CLUSTER	CLUSTER	CLUSTER		COMPLT
7	140 YALE DR	9				6.1	7.1	6.1	DEEMED	CLUSTER	CLUSTER	CLUSTER	CLUSTER	CLUSTER	30	PM 9
NOTES									DEEMED ROOF	CLUSTER	CLUSTER	CLUSTER	CLUSTER	CLUSTER		COMPLT
8	140 YALE DR	9				6.1	7.1	6.1	DEEMED	CLUSTER	CLUSTER	CLUSTER	CLUSTER	CLUSTER	30	PM 9
NOTES									DEEMED ROOF	CLUSTER	CLUSTER	CLUSTER	CLUSTER	CLUSTER		COMPLT

Dispatch Portal

Dashboard Customers Operators Tech Entries New Entry [+ New Job](#)

Master Tracker

STATUS

CUSTOMER

START DATE

AI

AI

MM/DD/YYYY

MM/DD/YYYY

Clear

37 of 37 jobs

STATUS	START DATE	REMARKS	CUSTOMER NAME	CONTACT NAME	FIRST ADDRESS	TOTAL	WARR ORDER	JOB OR PRI	WARR	JOB TYPE
STARTED	08/01/2016	41	NFL	TSARUK GILBERTO	2770 NW 1 ST/FF Bld	41	W041470129	JO8641-240		Leads
STARTED	01/26/2016	5	ZAC	Osair Beck	1342 LUNEL LN 31	5	W041470140	JO8641-302		Leads
STARTED	08/01/2016	54	NFL	Juan Mercado	1 JARDIN DE RANCHO VINO	54	W0414701507	JO8641-312		Leads
STARTED	08/01/2016	28	NFL	Juan Mercado	1 JARDIN DE RANCHO VINO	28	W0414701515	JO8641-312		Leads
STARTED	08/01/2016	33	NFL	Juan Mercado	1 CLUB A WOOD	33	W0414701532	JO8641-312		Leads
IN PROGRESS	07/02/2016	2	NFL	SAHAR LACROIX	492 ROCKY LANE IN	25	W0414701548	JO8641-312		Leads
IN PROGRESS	07/02/2016	10	NFL	TSARUK GILBERTO	1315 N 101 ST	14	W0414701598	JO8641-312		Leads
IN PROGRESS	07/02/2016	8	NFL	TSARUK GILBERTO	2419 QUALITY VIEW APT	9	W0414701681	JO8641-340		Leads

LOCATING APP

Full custom software for locating, built around their workflow

The locating app is not a form — it is purpose-built software written to the way Mattucci actually runs locates. Every job lives in one system from request to close-out, and the office sees the whole board at a glance: what is open, what is scheduled, what is waiting on a utility, what is done. Nothing has to be phoned in or chased, and the workflow is theirs rather than a vendor's.

STACK

Custom software

Replit

Job status dashboard

Role-based views

Built to their workflow

WHAT IT DOES

- Birds-eye view of every locate and its current status
- Custom software modelled on their process — not an off-the-shelf tool bent to fit
- One record per job from request through close-out, fully auditable
- Removes the phone calls, spreadsheets and status chasing between departments
- Scales with volume without adding office headcount

100s

HOURS SAVED PER MONTH

One board

EVERY JOB STATUS, LIVE

Dispatch Portal

Job #38

[— Back to Dashboard](#)

WORK ORDER #	JOB # OR PO #
WO#54725487	415-332
COMPANY	CONTACT NAME
NPL +	[REDACTED]
CITY	START DATE
Rancho Mirage	08/03/2026
JOB TYPE	USA #
Launch	
STATUS	
[REDACTED]	

Save Changes

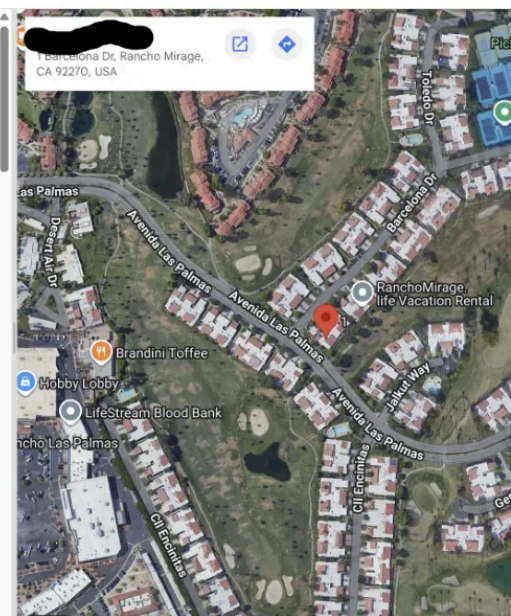
Upload File

Addresses (54)

+ Add

#	ADDRESS ▲▼	STATUS ▲▼	L/P	TECH	DATE ▲▼	TECH NOTES
	Filter...	All				
1	1 Barcelona Dr, Rancho Mirage	Pending				
2	2 Barcelona Dr, Rancho Mirage	Pending				
3	3 Barcelona Dr, Rancho Mirage	Pending				

Dashboard Customers Operators Tech Entries New Entry



The dashboard the office works from — every locate, its stage and its owner on one screen.

SERVICE FUSION → QUICKBOOKS ONLINE SYNC

A custom invoice sync where the native integration fell short

Invoices raised in Service Fusion now land in QuickBooks Online through a sync tool we built on Zapier and Replit — field mapping, customer matching and error handling written to Mattucci's chart of accounts. Bookkeeping stopped being a re-entry job, and the two systems stay in agreement.

STACK

Service Fusion

QuickBooks Online

Zapier

Replit (custom sync service)

WHAT IT DOES

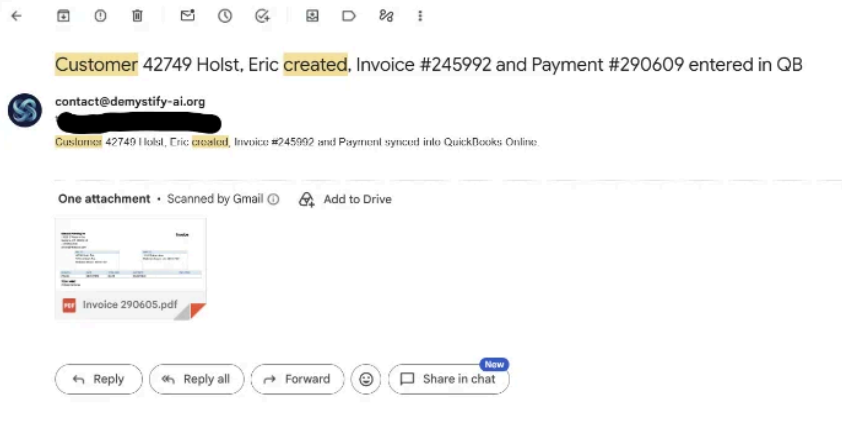
- Pushes Service Fusion invoices into QuickBooks Online automatically
- Matches customers and maps line items to the right accounts
- Syncs invoices, customers and payments, not just invoice headers
- Creates missing customers and items in QuickBooks automatically
- Flags failures instead of silently dropping records
- Ends duplicate entry between field system and books — no transcription errors, and reporting stays intact

1,250

INVOICES SYNCED PER MONTH

~5 hrs

SAVED DAILY — BILLING



The email the team receives once the sync run finishes. It returns about five hours a day to the billing desk — time the person handling AR/AP now spends following up on collections instead of re-keying invoices, pulling in aging money.

AUTOMATED EMAIL REPORTING

Daily, tedious, lengthy, customer updates and job reports, generated and sent in bulk

Report templates pull from Service Fusion and build customer-facing updates automatically — many at a time, not one by one. Office staff select the batch and the system writes and delivers it. The reporting the team used to assemble by hand each day now takes no one's morning.

STACK

Service Fusion

Zapier

Gmail

Templated report builder

WHAT IT DOES

- Builds customer update emails from live job data, in batches
- Reusable templates — new report types stood up in minutes
- Consistent formatting removes the errors manual reporting produced
- Scales with client volume without adding office headcount

630

REPORTS EMAILED PER MONTH

~2 hrs

SAVED DAILY — BILLING

"Not needing to generate the email reports probably saves me 1-2 hours a day... it's really nice."

GIANNA & OLIVIA — MATTUCCI PLUMBING