



ServiceTrade Demo with Scott Heating and Cooling

Quinton Stallings with A. Janssen, Inc. and Scott Heating and Cooling
Recorded on 9/28/21 via Zoom, 1 hour 26 min.

Participants

SERVICETRADE

Quinton Stallings
Territory Manager

Sarah Pittard
Territory Manager

OTHER

IPad 8303

Aaron Mendez

Gelasio Lechuga

Joe Mena

Oscar Leyva

Sal Service Manger

Salvador Orozco

Topics

<i>Call Setup</i>	0:00
<i>Pricing</i>	25:26
<i>Pricing</i>	28:50
<i>Pricing</i>	1:03:35
<i>Next Steps</i>	1:18:26
<i>Wrap-up</i>	1:25:23

Transcript

"This English transcript was generated using Gong's speech-to-text technology"

--- Call Setup ---

IPAD

0:00 You all hear me? Yes.

QUINTON

0:03 Guys. I'm so sorry, I had an emergency come up. I'm very, I apologize for being late today. Who's on the call with me today?

IPAD

0:13 So... hey... guys.

QUINTON

0:20 Okay. So, Eric, and is that like seven technicians?

IPAD

0:25 So, every last year? Awesome. Bye.

QUINTON

0:29 Okay. Fantastic. What's everybody's roles if you don't mind me asking?

IPAD

0:37 Well, Aaron, dispatcher, okay. Awesome. I lost your... technician.

IPAD

0:51 Dispatch for sale. Okay? Perfect. That was also by the way. Okay... fantastic. Well, I know there's a lot of people in the room. It's a little bit hard to hear you guys, but.

QUINTON

1:10 Pretty much my plan for today is to, first, I just want to learn a little bit more about you guys over at Scott heating and cooling, just as far as what you guys are currently using for software, how you guys are currently doing things. And then where are you guys might want those processes to be with the service management software. And after that, I'll give you some quick background about us here at service trade, and then we'll take a tour of the platform at the end. If this does it like a good

fit for you guys would provide your team with a lot of value. We can talk about pricing and what next steps would look like. Does that sound like a good plan for everybody?

IPAD

1:43 Did you, did you, can you see us?

QUINTON

1:46 Can't see, all I can see is it says iPad, there we go. Alright?

IPAD

1:52 Alright.

QUINTON

1:53 Hi guys.

IPAD

1:56 Well, I only thing even.

--- Call Setup ends ---

QUINTON

1:57 I think I introduce myself. My name's quit installing on the south west territory manager here over at service trade. And once again, I appreciate everybody joining us today, but if you guys don't mind kinda just give me a quick run through about how you guys are currently managing?

IPAD

2:12 Yeah, your...

QUINTON

2:12 Service operations and... and what you guys might be looking to solve with service management.

IPAD

2:19 Well, that's how a, we... we have both have a call back at.

IPAD

2:30 All of our technicians that I've had with them, which state, yeah, after the truck, and that's how we do all the invoice. We keep track of all to basically add to it until.

QUINTON

2:49 Things up in Quickbooks. Okay. It's... it's a little bit.

IPAD

2:55 Good to hear you guys, but you said you guys are using actually when... accurate... accurate? Okay, have you heard of that?

QUINTON

3:03 I have a little bit. I know it's... it's... it's heavily geared on the resident.

IPAD

3:08 Side of things. Do you guys do a lot of commercial service? Yes... hold on.

IPAD

3:24 But then it's by them and see.

IPAD

3:30 What about it?

QUINTON

3:31 Hello?

IPAD

3:36 I'm using iPad as you see up here. Okay. Cool... cool.

QUINTON

3:41 Whatever works. Nice. Yeah, I've heard evacuating. I do know it's... it's more geared on the residential side of things. You said you guys do a lot of commercial services that include like PMS recurring services as well?

IPAD

3:56 Yes, and yeah, wouldn't be in contracts and everything. I know that was lovely. So there's three ways of... invoice. Okay? The first when it's time and materials. The second way is our asset. We basically, you get if you with their way back, when does this way we can play with the flat rate pricing. You know, all that. But the flyway, what we've noticed... I did, they kind of made up or press... two for commercial. It's taxable or anything that's the tax. It doesn't even at the text or just the price itself. So where my mind is just the text and you see what I mean? Yeah... but... but as far as the commercial side, we usually use the asset and we just, you know, I will go ahead and, you know, put on my list prices.

QUINTON

5:00 I gotcha. Okay. So it sounds like the invoicing side of things is kind of what you guys are looking to improve on.

IPAD

5:07 That also, what do you get... quotes like a spreadsheet for quotes?

IPAD

5:22 Around... I know... Christian... I mean, I know that it just sometimes it gets a little complicated once you try to do a lot of, you know, as far as the tax regions and texting and follow up. I mean, it would... it would seem like it's updated a little bit... but this would be something that's a lot more simpler, easier exactly. So that's kind of, you know, that's why we wanted to see what you guys have to offer with what's you know, what is it that the first few from then?

QUINTON

6:03 Yeah, that sounds like a good plan. So, what... what I'll do is I'll just run you guys through two different views of service trade, the office view and the technician view as we go through the platform. If you guys had questions or if there's things that you guys like that you see or don't like that, you see, please let me know. I like to keep it more of a conversation than me just talking about you the entire time. Does that sound good?

IPAD

6:25 Yes, sir.

QUINTON

6:26 Cool. Deal. Well, let's go ahead. I'll go to share my screen here. Alright? Can everybody see that?

IPAD

6:36 Yes.

QUINTON

6:37 Perfect. So what you guys are looking at here is the office view of service trade. This is going to be the first thing you see when you log in and this the service dashboard. So it's a high level overview of the different stages of your workflow. So for starters, you have the daily schedule here. Everything going on today... you've got overdo jobs without appointments. So these are jobs where, you know, any type of recurring services team that you have that might slip through the cracks on you. They'll show up here in this book. You're reminded to get them back on the calendar. Yeah, jobs without appointments, do in the next two weeks, you can see all those upcoming jobs. Has jobs to be marked complete. This is where the technician completes the job out in the field. That work order is going to be seen here in this bucket for you guys to review, make sure everything is good to go before you invoice it out to your customers. And then lastly a completed jobs to be invoice, a final reminder to invoice.

IPAD

7:37 Out those jobs. Any.

QUINTON

7:42 Sincere about the dashboard?

IPAD

7:46 And again, like the weekly view of it instead of just like a daily?

QUINTON

7:52 Yeah, absolutely. So there's multiple ways to see, you know, your daily schedule, you can have a week.

IPAD

7:58 You or a month view.

QUINTON

7:59 This is just kind of like the dashboards, you see just a snapshot real quickly of what the schedule looks like for that day. There's a more in depth view that shows like a weekly calendar base for all your technician.

IPAD

8:15 And how does it know, like from the overview jobs without, like, how do you guys normally, those are like past jobs that need the week they're slipping?

QUINTON

8:25 Yeah, great question. So one of the things I'm gonna show you and let's go ahead and transition to that, it's a good segue is a location page. So one thing that we help you guys keep track of all your customers and locations. So I'm assuming for like your commercial clients, do you have that one parent company or corporate headquarter? And there's probably different locations that you guys service for them? Is that pretty accurate with y'all? Yeah. Yes. Okay. So to illustrate that, we have the Ellie fitness location page in Los Angeles here. And on this location page, you can see all that information regarding this one particular site. So things like your contacts there... you can see all of your services whether they are one time off services or repairs. And as you guys complete these, they're going to disappear from this section and go into your job history. But you can also set up things here like your recurring services, those teams that we're talking about. So here when you would create one of these services, and if I just click into one, I'll give you an idea of.

IPAD

9:33 It looks like you would...

QUINTON

9:35 Set up the actual asset you're going to be working on, whether it's a walking cooler, a rooftop unit, whatever it may be a description of what that service is going to entail. Yeah, any type of preferred technicians that are always on what you want on this service. So maybe you have some technicians that just do PMS or just do commercial work. You've got estimated price and estimate duration for job forecasting, submit to those higher paying jobs first. And then lastly the scheduling

window. So whether it's a particular day to get to that service, or maybe the entire month you have to schedule it. And then you can set it up for how often it's going to reoccur. So whether it's a one time a monthly annually, you can set these up any custom date range to reoccur. And you can also add on the type of parts that are always going to be needed for this particular service. Now, you mentioned on the dashboard in those buckets once you save this service here and it's passed to do it's, going to show up here. Hey, that's read. But it's also gonna fall into that overdo jobs without appointments bucket to let you know what needs to be scheduled. Does all that makes sense?

IPAD

10:49 I had a question for you, boss. Yeah. Is all this is showing? Is this only for dispatch or four techs? So our take is going to be able to do their own scheduling is showing us, is this search for you guys?

QUINTON

11:03 Allow your text to schedule themselves now? No?

IPAD

11:13 Yeah. What you're looking at here is that there was a dumb question. No such thing. Wow. I didn't... know that.

QUINTON

11:30 This is the office view. So this would be setting up your... your recurring services.

IPAD

11:35 She's okay. Both, look at the dashboard. So this will back to the dashboard. Yeah, will not be able to see a dashboard for all the text. What all the text have for that date? Say, for instance, I have seven.

QUINTON

11:50 And...

IPAD

11:51 For and for installed so far? Okay. I would like to see.

QUINTON

11:56 What each of those more.

IPAD

11:59 And installers have today's? Date pretty easy. Yeah.

QUINTON

12:03 100 percent. So we have a literally a section of service trade call the dispatch board. So essentially, it's kind of what you're describing all your technicians are gonna have their own what we call swim Lane. So on this left hand side here, you'll have all your technicians, and then you'll have their jobs. They're jobs here. So wherever you know, they are currently throughout the day, you can click into these jobs. You can see when they get there when they've recorded like a repair or taking pictures, even when that job is completed, it's going to have a little check mark there.

IPAD

12:37 Do you guys connect to horizon for GPS location... or?

QUINTON

12:44 Tracking their GPS location?

IPAD

12:47 Can we add our own GPS location to yourself? We use horizon.

QUINTON

12:52 Use the horizon, click connect. Gotcha. So... I'm not sure if horizon connect is one of the... the softwares I think that integrates with us as far as for GPS tracking, but service trade within its core application tracks. Your technicians are where they are at during the day, based on their clock events, what are you guys looking to get out of from a tracking standpoint? Like are you looking to... to keep track of where the... the trucks are in real time or just kind of where the text?

IPAD

13:21 Located. Well, we... we have it as real time as a separate tab.

QUINTON

13:28 Yes, just keeping one.

IPAD

13:31 You often just clicking on this that's normally where at?

QUINTON

13:37 Yeah, I don't think horizon connect integrates with service trade. There are a few, one is called a zoo guy that we recommend. And there's another one called think field logics. As far as for GPS tracking.

IPAD

13:50 My gosh drop tracking also that's Chuck, but she asked me to track the, buys a technician to use it for service trade, right?

QUINTON

14:00 100 percent 100 percent. So one of the things I'm gonna show you today, but you can see real quick on a map here. These are where your technicians are... are on the map based on their clock events. So you can see that Brett as arrived at this job and he is at the Butler health and recreation complex. You also get their clock events down here at the bottom. But on the actual work order, there's a little section. I'm going to show you where you can click into each of their clock events and see where they were when they clocked. In and clocked?

IPAD

14:28 God, the jobs. Okay. So that's a good... thing.

QUINTON

14:40 Any other questions before we go back?

IPAD

14:42 That location page? No?

QUINTON

14:45 Right. Cool.

IPAD

14:47 Okay.

QUINTON

14:50 One thing I wanted to point out the real quickly for these PMS though is when you guys.

IPAD

14:54 Set these up here on this location page, it's kinda like...

QUINTON

14:57 Or rolling clock like a set and forget. So you're not gonna have to recreate these each time that your text complete them. It's going to automatically recreate that work order and remind you guys a schedule him.

QUINTON

15:11 The next thing that we have here our jobs. And I keep saying this, but jobs and work orders at the same thing and service trade, they're interchangeable. So you have all your work order history. Who was there? What happened on those jobs... all the assets at a location? And this is probably going to be more pertain to your commercial client base. But you can keep track of like all the rooftop units, the chillers, cooling towers, whatever it may be. Each of these individual pieces of equipment has their own page. You can click into, see all the service history. You can see like attachments as far as pictures manuals, maps, the whole nine.

IPAD

15:48 Hello?

QUINTON

15:55 Next is the deficiencies and... deficiencies and service trade are repairs that your techs have either completed and fixed out in the field or maybe still need to fix... all the quotes that you've ever sent out for this location, whether they'd been approved, still in draft. And then lastly, any comments. So these are all site specific. Maybe it's an alarm code to get into the building or, hey, every time we come out here, we need to bring a tall ladder. But what's cool is when you add them to the location page, they're going to automatically pull onto the work order that you send out to your technician. So you're not always having to constantly remember, hey, for this particular location, we need to add that alarm code for that second to have access to it's. Gonna pull to that work order. Your text will have access to it from their device.

IPAD

16:42 Okay.

QUINTON

16:46 And then down here at the bottom is location documentation. Once again, this can really be anything that you find valuable for your text to have, whether it's in a map of the building or, you know, a manual and how to operate a piece of equipment.

QUINTON

17:06 Any questions here about the location base?

IPAD

17:09 All of those, all of those icons are for... each... each, I guess invoice or each job, right? We can go to each job and it'll have all of those. We can click on and see that info. Got it. Okay.

IPAD

17:40 Are these... are like... your... your customers that do get the software you guys work with like licenses and everything like that... we have, you say, like, yeah.

QUINTON

17:58 Yeah. Yeah. So the way that the, our... our pricing is structured is we Bill is solely by the mountain technicians that you have. All of your office staff is free unlimited users and just solely is based on the amount of technicians that are you.

IPAD

18:11 In the mobile app? Okay. So, both of the offices, unlimited users, right? It's just the end of the technicians out on the view. Okay? You got it. And then how would it work for? Is there... is there a way I could work to where they're correct? So.

QUINTON

18:30 Wherever, using.

IPAD

18:32 I mean, we've been using it six year. So there's a lot of information. Can any of, are we starting out new by using yours? Or is there any way any of that can be transferred over?

QUINTON

18:46 It's a great question. So, one of the things that you guys were to sign up with service trade is our onboarding?

IPAD

18:53 Says.

QUINTON

18:53 We assign you a project manager and he essentially, he or she is, this is assigned to helping you guys get your current information out of your current system and import it into service trade. So some of those things are like your customers, your locations, the assets that you guys have, recurring services, you have, set up parts and pricing. All of that can be bulk imported as long as it can be exported via excel file or.

IPAD

19:24 Wow. Gotcha. Yeah, that's... that's a plus. Yeah. Yeah. Yeah. No, that's not true.

QUINTON

19:37 Sell that on the, how you do that over time?

IPAD

19:41 Yeah, yeah, because we've been using that for that's. Exciting news. So.

QUINTON

19:47 Yeah. So you guys probably have a ton of information in there.

IPAD

19:49 It's about you guys have been several flat rate price... flat rate pricing if like for technician... job site versus like, yeah, you guys have a flat rate pricing or how do you price out a customer? Is that, you know, both of that? Let's... let's go ahead and.

QUINTON

20:14 Hello. Let's go ahead and move to the work order real quick. That might clear up a few of the questions. This is the work order that I developed us for today. So

essentially on this work order and keep in mind, we're still in the office view. You've got the Bill to ship to information, you have the appointment details... you can assign as many different technicians to a single work order as you'd like, so I've got my cell appear on the job. If I wanted to add additional technicians, I could do so same thing with services. You can as many different services to a single job as you'd like to as well... now... for parts labor and items. If you guys know the parts needed and the labor ahead of time, you can add that to the work order or if it's something flat rate, you can simply put a flat rate price of what it's going to be in... in that. It's going to be what your... your customer would see on there and.

QUINTON

21:13 That clear up any questions?

IPAD

21:16 On that flat rate, obviously, we have to transfer are for, or I don't know him for right? The pricing or anything... because, yeah, you question is, do you guys have any flat, right? Great pricing in your software?

QUINTON

21:34 Like that's like already in there as far as like a... like a price book?

IPAD

21:38 Kind of... yeah.

QUINTON

21:41 No, that's... that's not something that we have just like in the software, but you guys, any pricing that you have currently, you can import that into service trade. So if you have some like flat rate items or... or different types of pricing that you have for products, you can add that into service trade for you guys have access to and then you can add them over time.

IPAD

22:00 Well, as far as that, this, the pricing, can we add pictures to it? Like for example, just picture of a feature of our contract or whatever?

QUINTON

22:11 I don't know. Let's find out, see.

QUINTON

22:18 So, you just wanted to see like what the... the part would look?

IPAD

22:21 Kind of, yeah.

QUINTON

22:23 Okay.

QUINTON

22:29 So, you got the code, the description, the service line type in the standard costs. So I don't think a picture or something that you can do, but trying to think I can make a note and find out if like any of our customers are adding pictures to their cards. So you can do descriptions. How are you guys doing that? Now? We don't...

IPAD

22:57 I have any pictures and ours just have a flat rights.

QUINTON

23:01 No description. Gotcha. So yeah, it sounds like it'll be kinda similar here as far as your parts and items, but you can add as many different pictures to like work orders or location pages. If there's like certain parts that you need them to... to know what it looks like. So, there's like a part where you're not sure if they know what's a pool or maybe I guess what's the use case for that for having the picture of the part?

IPAD

23:28 No, as far as the algorithm that the fee for the software we have, we do some technical type in, for example, contact or the algorithm, good to know right away the size of a contractor or you're going to give us a general idea?

QUINTON

23:47 No. So it won't just automatically generate, you know, the... the parts that you need for a, are you saying for like a particular job, it'll generate the type of parts that you need or how many years?

IPAD

23:57 Let's assume that we already put all of our flat rate pricing and we already have a major listing?

QUINTON

24:02 Yeah. So.

IPAD

24:03 Whenever we look for a specific... we type in contact there. What is... what is your software going to show us all the contractors that we haven't been lists? Or do we have to type in a specific size of a contact or... or it's just an example, like electric creating a search, like you just service or all of them will pop up? Yeah.

QUINTON

24:27 Yeah. So like when you search for parts here, let me just add a job item. Say I'm looking for a widget, as I'm searching for widget, it's going to pull up all of those different types of parts do you guys have? And we add them, it will add the... the

price to it and also whatever you mark it up as like your different customers. If... if you have certain parts that are set up, you can add as many different ones as you want. So if there's a contact or I think that's what you said, you can set up different types of contactors in your items list for you guys to just search it'll... it'll, populate...

IPAD

25:01 Correctly to the work order. Okay? And the label?

QUINTON

25:10 Labor is just for any type of rates that you guys have.

IPAD

25:12 There, it's...

QUINTON

25:13 Four different technicians or different types of work that you do. Some people charge different for like H back, whether that like for duration, you can set up whatever kind have labor rates that you guys want.

--- Pricing ---

IPAD

25:26 It's timing material and not charging a flat rate. Like how would you add that to?

QUINTON

25:33 If you just wanted to do a flat rate?

IPAD

25:35 Yeah. Well, not flat rate, just work there two hours and the cost 200 dollars material. So you're adding. So what's your software at the time that you're there? Depending on the time the clock in and clock out, we will support... calculate that.

QUINTON

25:52 Hello? And.

IPAD

25:54 All you gotta do is just enter the material and at the very beginning just total.

QUINTON

25:58 Yeah, 100 percent. And that's one of the things I'm gonna show you guys when we come back into the office with the work order, is the clock events. So we keep track of time in three main ways. One is the amount of time it takes to get to the job site, the in route, the amount of time you're actually working. And then lastly, any

type of job preparation, which would be like building up a truck or finishing cleaned up the site. But all that's going to total here and you'll have your different clock events that won't transfer directly to the items to be invoice. It's just for you guys to reference. So like, okay, they were working for a total of six hours. We're gonna put six hours of labor here. It's an...

IPAD

26:35 But basically piggyback on the itemize it for the customer. You just in the us know, which is going to let us know how long in reality, you know, that text to do anything for that job. And just...

QUINTON

26:48 Right, right. Because it maybe, you know, you charge the customer for hours of labor, but your guy end up doing it three, you know, you probably don't want to cut that to automatically go into the work order for the customer to see that they're actually only.

IPAD

26:59 Or for three hours?

QUINTON

26:59 This one's the situations like that, so you can put actually exactly.

IPAD

27:03 What even charge the customer? Okay. So basically what the software is, it's designed to do is, yeah, just for you to put it on the... the park?

QUINTON

27:14 The neighbor?

IPAD

27:15 And it'll just, you know, figure out the total costs, not what I'm...

QUINTON

27:20 Asking, is.

IPAD

27:21 There a way we can put like the, so the way we work over here at flat rate system is like to change that up compressor. We had it for 2,500 dollars for... three ton convention. Okay. Well, then 2,500 dollars. Thank you to favor you're. Back to general... you're... you're... you're facing materials, your impression of your starting point, but I think that's... that's what we call a flat rate. So it's all, are we able to do that in the system as well?

QUINTON

27:57 100 percent. Yup. You just wouldn't have the... the... the labor and the items in there. You just have one one item for your flat rate cost.

IPAD

28:05 Exactly. Basically one. I've been model and they'd be going in there, but, you know, the drivers and spreadsheet and I don't want to be itemized the problems that we... we got a flat rate. So the way we work, you know, we usually take six hours for price or if they use that flat rate that they go to two hours, six hours, right? But right? That's what I'm talking about you guys.

--- Pricing ends ---

QUINTON

28:32 You know, you get 100 per cent, do it that way and service trade. This was just an example that I had set up for time and material.

IPAD

28:40 Yeah. Not only state, how would you do that in your software?

QUINTON

28:45 You would, you would just, I wouldn't have these items here and whatever you wanna call your... your flat rate pricing as far as for that... that... that one line item, you can either set that up to where you can search for it or you can just put in a random name, like... I actually have an H back flat rate... but it would be like you said 2,500 or something?

--- Pricing ---

IPAD

29:12 So it, it'll... it'll just show up as one item, correct? Okay. Yep. Okay. Sorry.

QUINTON

29:24 Took so long to... to answer. I'm glad... glad we clear that up now.

IPAD

29:30 Yeah. So.

QUINTON

29:38 Does that all make sense?

IPAD

29:40 Yes, it does perfect. What about... like time sheets and all that... technician actually work? Yeah, absolutely also look like on the system that we have an accurate... when we use a flat rate, same minimum Adobe like local presence six hours. Well, I, when I looked into that, it will just for each of about 10, I check that or

I should show and automatically flat rate themselves ours. Is that something that we will probably do also? Yeah.

QUINTON

30:27 Yeah. 100 percent. We actually have a like an add on feature.

IPAD

30:30 Service rain called the service trade time card?

QUINTON

30:33 Which essentially does... does exactly what you just described. It keeps track of all your technicians hours for either payroll purposes or they can even, you know, add in their overtime hours. They can put in sick leave, even vacation time. All that can then be sent to, ever reviews those time cards and then export it to your account.

IPAD

30:51 System... but it only calculates the... the... the real tough but the tickets there, right? I can, I stop the BuildOps rather than... that. Yeah, it'll calculate that as well.

QUINTON

31:09 Yeah. They'll calculate the Mountain Time that they're actually working on that site, the amount of time they were driving on that site. And anytime they, that they were using to prep for?

IPAD

31:17 That site as well?

IPAD

31:23 Will calculate only build hours, not drive time, just feel dollars whatever we build the customer. Yeah.

QUINTON

31:31 It'll be your onsite time would be like build time.

IPAD

31:35 So that specific section of the software we could actually get to make go right over here where it was going to be in charge of it. We could do changes to it, maybe block something for that takes you to be able to mess with it and only maybe the supervisor or manager.

QUINTON

31:53 I don't think you can kind of manipulate the time card. It's pretty out of the box. So to say, what were, what would be some of the things that you wouldn't want the text to... to have access to because there is permissions that you can set up.

IPAD

32:08 It's just what they're asking is that flattery, we use six hours. They're only there for four and a half, right? So this is just showing the actual time to reorder report and a half.

QUINTON

32:20 Or...

IPAD

32:22 That's that's what I'm saying these calculating the time to actually spend like as to what the system is actually with tiny before.

QUINTON

32:30 Yeah, it's going to be tracking the actual time. So the actual, the... the total amount of time that they were there on site, whether it's... it's not going to be the amount of time that you guys have charge the customer something, that amount of time they're actually working there on the site, what you would see I'm on the time card, but you can also track the job items for that technician, which it sounds like that would only be one job and...

IPAD

32:50 Be that one flat rate charge.

QUINTON

32:52 So, you can also see how much that tech was our for that job at tech was there and you guys build that particular amount of hours for that... for that one job. That makes sense?

IPAD

33:02 Would it show like profit margin as well? That's basically what they're going to be looking at? Yeah. Okay. Your...

--- Pricing ends ---

QUINTON

33:11 As far as product profit margins, would you just want to see like how much time he was actually working, compare to how much you build the customer?

IPAD

33:17 Yeah, yeah.

QUINTON

33:19 Yeah. You'd be able to sit down the work order?

IPAD

33:22 Okay.

IPAD

33:28 Okay.

QUINTON

33:30 Alright. We all good as far as.

IPAD

33:32 Work what it looks like. It's sir. Alright?

QUINTON

33:36 Coolio. Guys, let's go ahead and go out to the field. I want to give you an idea of what the taxi... and you guys send them that?

QUINTON

33:48 I'm sorry, what was?

IPAD

33:49 Yeah, that will be in that for the... for the texting download, their I pad or is it all through the internet? Okay?

QUINTON

34:01 I said, I'm Matt, for them to download?

IPAD

34:05 Now an application like?

QUINTON

34:09 Sorry, guys. It's... it's a little bit hard sometimes to here, but yeah, it's an application, yes, sir. So, there's gonna be a service trade app. They can download on their devices. They can use it on android or?

IPAD

34:20 Well, products.

QUINTON

34:22 And this is what it would look like on their device. Let me pull it up real quick and the full screen.

QUINTON

34:35 Alright. So, for instance, on this work order here, techs are going to be presented with eight different styles of information regarding.

IPAD

34:44 The services they're there to perform?

QUINTON

34:46 The job comments, deficiencies, any type of attachments, like before and after pictures, they wanna take all the contacts regarding that site, paperwork like maybe a PM checklist. They want to add to the work order, the job items they're... they're supposed to use, any type of assets that they're working on like the pieces of equipment that you're servicing. But I want to go down here to the bottom for the clock events. So you can see that I've been driving for about five minutes now. And if I click on that orange bar, I can go ahead and notify the customers that we're on the way to that job site. So I can come in here, click on my contact and say, hey, I'll be there around 350. Now, once we arrived at that location, I'm gonna clock out saying that I'm there, I've arrive, it's gonna prompt me if I want to clock in on site. Now, click okay. Once we're going up to this job site, we can go to the services tile, click in there and see that we've got an H back unit that were there to work on it's. Gonna provide me that checklist of items on there to perform. And what particular unit on there to service. Now, as we were working on that particular job, we didn't notice a deficiency. We want to quickly log quoted out to the customer. So I'm gonna click on that deficiency style and let's just say that we found a broken compressor. Now service trade allows your technicians to easily described these deficiencies in multiple ways. So they can take photos, videos, even record audio messages. So if I take a couple of photos here, have this broken compressor. No, it looks pretty messed up. Go ahead and add that. But I also want to record an audience member. Now, it sounds like most of your guys, his stuff is going to be flat rate. But for some reason if they went to an audio memos, saying something along the lines of like, hey, we're out here in this job, it actually took this amount of time to fix this compressor that we need to fix here's. A parks are going to be needed for it. When you get a quote out to the customer as soon as possible, whatever that narrative make might be, that technician can log that audio message and save it directly to the work order for that person. The opposite listen to. The next thing it'll say is the severity of the sufficiency. So for now, I'm gonna say it's an operable, it's not working. Gonna fix it immediately... we can tied it back to that. Unit that's associated with build out that service history. So we'll come down here to that rooftop unit... and then finally state that it's a new deficiency. We just found it.

QUINTON

37:35 Now, once we hit save, you guys in the office can actually be set up to be notified saying like, hey, I'm just found this deficiency at this L la fitness here's. That audio message, the picture, everything needed to create a quote. So you don't have to worry about that set calling that in texting it, whatever it may be dropping off that work quarter, it's all going to be in real time. For instance, back here in the office, I'm gonna do a quick refresh here of this work order, but there's actually a deficiency section on this particular work order here. So if I scroll down here to the bottom... boom, there's that deficiency. So we've got that broken compressor on that particular unit.

QUINTON

38:24 They'll pull up the deficiency details. So here we can click into that particular work order that's associated with. You. Got a quick description of that efficiency, the history there. So maybe like it's been fixed X amount of times on this particular unit, maybe we just need to swap out that entire H back unit. And then here are the picture and the audio messages that we just took now to add this also a quote. It's a couple of clicks of a button. I just click the add to quote, create the quote. And one thing that we allow you guys to do is create your own custom templates. So these are templates that you guys create and save you from constantly having to create quotes from scratch. All I have to do to create it is just hit the apply quote template, choose whatever custom template that you guys need. So I've got a compressor replacement here. You'll provide me with whoops. Looks like my screen share just timed out. Let me add this bad.

IPAD

39:27 Yeah. Yeah.

QUINTON

39:30 There you go. Can you guys still see? Okay, cool. So on this quote template, we've got the description here. This again can be anything that you guys wanted to be. If it's going to be flat rate. It'll just add...

IPAD

39:45 An item that's I'd say a flat rate price.

QUINTON

39:47 But here we have it broken out into the to the line items of parts and pricing. I can go ahead and add it to the quote. But none of that is set in stone. We'd like to say get you about 80 percent of the way there. The other...

IPAD

39:58 Percent you're probably gonna customize it for that.

QUINTON

40:01 So, you can tweak that quote description. You can adjust the parts labor items here or maybe that flat rate price and it's gonna provide you with a gross margin down here at the bottom. And once again, all this can be adjusted. So, for instance, this gross margin is looking a little thin. We'll add a certain contract that we have in here. It's gonna adjust some prices on the right hand side and provide us with a gross margin down your about 51 percent.

IPAD

40:32 No, the tech in the field. If he's doing this, giving the customer cool, can you create it? Won't be honest? Well... cannot.

QUINTON

40:40 Great. Well, he can, he can't so service trade has a additional parts management solution called partsledger. Now, it's not something that we recommend starting out with something that we recommend our customers growing into. But one of the... the main things that partsledger does is allow your text to create a po from the field. Now, they can from service trade core application level, say, hey, we ordered X amount of parts from these vendors or this vendor. And here's the amount of cost it was, they can do that at the po number to the work order, but they can't like generate a po within service trade without partsledger. Does that make sense?

IPAD

41:23 Yeah. But for it to get it, so you can do it from the office service trade?

QUINTON

41:31 Yeah. I mean, they can add parts from their device and I'll show you what that looks like from a, from the field and from the office to like let's just say, for instance, here in the office, this perspective we added, I'm gonna do a widget... and we need to order it from. Okay, you know what I'm essentially is not the right screen, do it on. We'll do it from the work order.

QUINTON

42:02 So if we add a widget here... you can select the item source. So if it's a parts vendor, you can select the different parts of vendors that you guys have set up or it can just be a custom one also like abc parts, you can enter a po, and then the status of whether it's not yet ordered, it's board or receive.

IPAD

42:24 The po, we have to call the office and get the appeals first, put it there, right? The tablet on the software itself, what my name is generally one. And as we get that other, so.

QUINTON

42:34 Hello. How are you guys doing it now?

IPAD

42:39 We could generate ourselves in the tablet in the field. Yeah. Yeah. But it all comes down to is because we give them permission to yet. But a lot of times the archive domain, you're going to the computer and he generates a field at what generates the feel for it.

QUINTON

42:58 Hi, Quinton, generate po. Okay. Yeah, if... if you're generating the po within service trade, you would need partsledger. Yeah, you would need partsledger. It's a new po.

IPAD

43:11 Like the waiting, just show them. How would they be some parts you're you actually?

QUINTON

43:17 You...

IPAD

43:17 Can actually run whatever number you want to come up with for food.

QUINTON

43:23 Yeah. Yeah. So, like if you... you know, ordered some parts, you can add to those parts in individually, select where they're being purchased from, and then add that po number in here. If that's if that way would work for you guys and that's you can 100 percent, it would do it.

IPAD

43:38 Okay.

QUINTON

43:47 Back to this quote though. I'm gonna go ahead and send it out and show you what it looks like in the customers view. You guys have access to your email. Yes, perfect. Let me grab one of the, whose email would you like me to send it to?

IPAD

44:07 Services Scott?

QUINTON

44:25 I'll put Sal on there as the contact.

QUINTON

44:39 Cool. So, so I'm going to send this out to you, but before I do, you can actually adjust what you want the customer to or not to see. Now, our customers like sending the quotes out with pictures because it kind of shows that customer exactly why they need to approve a quote, but you definitely probably couldn't leave the audio message off because who knows what your text might be saying?

IPAD

44:59 On the field probably.

QUINTON

45:00 Don't want the customer to hear any of that. So you can toggle all that information on and off and I'll send it out to you if you don't mind just pulling it up in your email for me and approving it. And once you guys are going to look at what the customer would see on there?

IPAD

45:45 Yeah.

IPAD

46:03 Yeah.

IPAD

46:13 Yeah.

IPAD

46:19 Just put one thing before.

QUINTON

46:22 Yeah. So what you guys are looking at on that top left hand corner that's actually going to be your company logo... description of the work, the service to be completed, the photos or attachments that the customer can click on, and then your own custom terms and conditions there. At the bottom. Now, everybody loves had a call. I called the green money button that approve button because it makes it really easy for the customer just to click on it, approve it, they can add a po and in there if they have one and then agree to your custom terms and conditions. But they can also request changes. So like if there's something on the quote, then maybe you want removed or something that, you know, price is too high. They can come in here, request that change. It's instantly being seen in the office. Whoever is managing those quotes, they can open that and get it right back out to the customer.

IPAD

47:10 Yeah.

QUINTON

47:16 Curious to know that. What are your guys thoughts are about, you know, generating quotes here in service trade and then making it easy for your customers to approve them?

IPAD

47:26 That's awesome. I didn't know the non self generated fields for the technician... that, that's... that's pretty nice. Yeah.

QUINTON

47:42 Yeah. I wish I could help more on the... the generation of the po is, I mean, like I said, they can add those parts that they purchased in the field and where they purchase them from. But if they, if you want your text to actually generate a po that's something partsledger would take care of and it's something available. It's just not something we recommend starting out with because service trade is such a beast that general migrating to a new software and getting the customer to it, we recommend starting out using service trade first, making sure everybody knows how to use it, and

then adding parts ledger as you guys renew. But glad to hear that you guys aren't the quoting features. It's probably one of our customers favorite function of service trade.

IPAD

48:22 Yeah, that's a good question will be transferred to the appropriate.

QUINTON

48:29 Missed that. What was that?

IPAD

48:33 No, that was on the phone call? Okay?

QUINTON

48:41 Back in the office, you can see now that quote status has been changed to approve to add this quote to a job and get it scheduled out. You just hit the create job from quote button and everything from that particular quote, it's going to pull over to the work quarters to you're. Not read typing all that information and you're getting scheduled right out. Same thing with the add to an existing jobs button. Maybe it's something that your technicians are still out there on that job site and want to signature from going back out. You can add this, approve quotes from existing work order. We also provide you guys a history so we can see when this quote was created when it was viewed, couldn't who approved it. It's all timestamped as well.

QUINTON

49:30 Any questions before we... we move?

IPAD

49:35 No, no.

QUINTON

49:39 We'll do let's go ahead then and go back out to the field, will wrap up that work order.

QUINTON

50:06 Sorry, I'm just getting my screen share to work real quick... one second here.

IPAD

50:19 So right now, since we're still in the process will be here, but there's a lot that... will keep you on hold and I will call you back, I believe was really... crazy... busy that it's a lot of things.

QUINTON

50:50 Sorry about the delay guys. This getting this, the screen share sometimes at times out to show you what my iPad see.

IPAD

51:06 Yes.

QUINTON

51:08 Four three nine zero.

QUINTON

51:16 Okay. Alright. We're back. Everybody's still with me? Yes. Alright. So back here on the work order, I'm gonna go to the section called view more details. This is going to be in more in depth view of the work order. So if I click into that, we can see things like the asset information that we were talking about. Your technicians can come in here, see that particular unit that they're actually servicing, can click into it and see all the past service history. As far as like the jobs that were... were completed, they can see all the efficiencies either been logged, whole list of job history here. They also get a look into the asset information like the make model, serial number, installation date related. It's a whole nine yards of different fields that I can fill out for information regarding that one one unit. Now, do your technicians get like signatures from customers when they complete the job? Okay? And are they filling out any type of like maintenance checklist or our maintenance forums? Yeah.

IPAD

52:33 Yeah.

QUINTON

52:35 Okay. Cool. Up here are the actions button. We have a section called downloading blank paperwork. So essentially any type of forms that your tech fill out whether it's a checklist or a maintenance form. They can come in here, select whatever form they need in generate it. And what service trade does is we apply smart rules to these forms. So all the like general information regarding make model, serial number for the assets, the general customer information is going to automatically populate and filter the form. So literally all they're going to have to do is check boxes and submit the form.

IPAD

53:12 Okay.

QUINTON

53:17 When that take is ready to get the signature from the customer saying that... that jobs complete, they once again can go back to the actions button and hit create working knowledge meant it'll have a picture of that technician, your company logo. They can select the contact there on site or add a new contact if needed. They can also toggle on and off what they want the customer to or not to see. I've got the services that we did today. The parts that I use, if they wanted to add some parts that they use in the field are parts that they need to order. Just like in the office, they can

do that from the mobile app... select the vendor that they need to order it from, or they ordered it from inner a po, if they have one.

QUINTON

54:12 And say that to the work order. When it's ready to be reviewed by the customer, you just hit their review button, turn their device over. Have the customer scroll through. These are going to be your disclaimers and warranties and they can confirm and sign.

QUINTON

54:38 Any questions about that? No, that... seems pretty easy to use. Yeah... fantastic. Well, last thing that will do here is go ahead and clock out of this job. But before I do that, I do want to go here to that comment section just to show you those two comments that we had on that location page. They pull directly onto the work quarter. So there's that alarm code to get into the building or is also that latter that we might need? But your text can also add comments. So they can either be job specific directly on this one particular job or they can add additional comments, the location page, like, hey, check in with this person every time we come here and it's gonna say to that page. So it's always gonna show up on.

IPAD

55:26 That work order.

QUINTON

55:33 So we'll go ahead and clock out down here at the bottom. Once I select that, it's gonna ask me if I completed my services today. I'll check off that I did... and finished clocking out.

QUINTON

55:52 Back here in the office, we'll go to that work order again.

QUINTON

56:01 We can see that... that service has now been changed to completed.

QUINTON

56:10 There's that widget that we just added from the field.

QUINTON

56:16 Here are the clock events of where your tech was when they clocked in when he wasn't he clocked out. It's total time. If you notice this little caution symbol that saying that, okay, quit and said that he was on-site he was working, but he was actually 2,200 Miles away from the job site. So you can click and say, well, let's see. We're equipping was that... and quit and was actually in Raleigh, North Carolina, not in California.

QUINTON

56:48 So he was nowhere near where he said he was.

QUINTON

56:56 Down here at the bottom, you have the job attachment. So here's that worked at knowledge meant from the customer that we got a signature from. This is also going to be where like that maintenance form would live if we were to have complete it.

QUINTON

57:15 And then of course, any type of job specific comments that we were, if we were to add.

IPAD

57:19 To the work order as well.

QUINTON

57:22 Once this is ready to be invoiced out to the customer, all we have to do is hit the complete jobs button saying that we gave it that approval. Everything looks good. We're gonna complete the job and create the invoice. It's going to give you a final adjustment base, make sure you need to add any parts, adjust the pricing.

QUINTON

57:48 And now ready to be sent to the customer and you guys mentioned that you're using Quickbooks?

IPAD

57:54 Yes, but the concessions on site. So, or do they have the option to create the invoice itself? The calling the office?

QUINTON

58:04 Is that more for like your residential clients?

IPAD

58:08 Hours that's your clients were collecting some like there are some exceptions to... to us.

QUINTON

58:14 Yeah. So on that working knowledge meant there is a little section called generate invoice, so they can click generate invoice and actually have a pre for pro forma invoice for the customer to review. And then if they wanted to collect payment, it would be like cash check or if you have a separate card swiper that the text carry around that's how they would collect on?

IPAD

58:37 Hi... there also, I know you're... you're showing us when it's completed invoices or like away from this marketing, complete that part spendy. Yeah, yeah.

QUINTON

58:53 Yep. So with the way that would work is we wouldn't have had completed the.

IPAD

58:57 Job, we would left it on complete.

QUINTON

58:59 And there's a section like a jobs report and you can run a report saying I want to see all the work orders that have parts ordered but not yet received. You can have a bunch of different reports ran regarding like parts as far as that have been received. Haven't, been received, things like that.

QUINTON

59:20 Under the sun invoice link, we actually have an integration with Quickbooks. We work with online. We also work with desktop, but right, understand invoice link, it'll say send to accounting system. Reason I don't see that button is because we don't have a Quickbooks account counting system setup with our demo account. But if you click onto that, it's actually going to sink this invoice directly into Quickbooks. You're not have to worry about doing any type of double data entry. And when you send the invoice out within service trade, this is what it would look like. So I'll pull it up in the full screen preview kinda like how our quotes, I had that approve button, that green approve button. Well, this is legit, a green money button and says pay now button. So it's gonna have your guys is logo. Again, once again, this can be broken down for time and materials or just flat rate. But now the customer can just click on that pay now button and pay with a credit card or they can pay with AC. H.

QUINTON

1:00:20 They also have a service details section. So if you have a customer that always this questioning price, they actually can come in here and get a full job summary of... of what you guys did on that job that day.

QUINTON

1:00:39 Any questions here about the invoice? What are your guys thoughts?

QUINTON

1:01:01 I'll take silence as a... as a good thing.

QUINTON

1:01:10 Cool. Well, hey.

IPAD

1:01:11 We've been through.

QUINTON

1:01:12 A lot in the shore hour, but I kinda just wanted to gauge you guys as far as his service trade look like a good fit for you? Is this kind of what you were hoping to see from a service management platform?

IPAD

1:01:26 So...

IPAD

1:01:35 I like a lot of things that you guys have to offer... some things. I like seo... and... and, you know, the, how I pay my diet build hours spell that I like see if that's something that will work with us. Not a must, but overall, I did I pronounce your name correctly? Yeah.

QUINTON

1:02:04 Yeah, awesome. And what were some of the main things that stood out to you live?

IPAD

1:02:10 The portion of it, you can send the customers a green button for them to a group... that's pretty... that's pretty nice, stood up... to keep check, the tech scene, GPS... take the pictures, the recordings. I mean, all that you don't have that. In that one, we do have something where you can send attachments. But for some reason, once we start getting... like food does have an attachment and it just... it just crashes... that, no, I have a question for you. This all your software, is it all one, everything they use, you said that you talked about is included or do we have to be doing a little add-ons for the initial software?

QUINTON

1:03:06 Everything that I showed you here today is all included. It's in our select plan. It's our base level package is probably what I would recommend for you guys. Start off on. The only additional things would be for like if you guys wanted to have the time cards for payroll, and then also if in the future you wanted to add on partsledger, which is more of our high level inventory level, our inventory tracking po generation those are the two Adam.

--- Pricing ---

IPAD

1:03:35 So right now, for the base basic, one does not include the time, she said no, but it's really.

QUINTON

1:03:41 So typically cheap, I think it's like 14 dollars extra per technician. It's... it's pretty doable... partsledger gets a little pricey but the... the time cards relatively cheap.

IPAD

1:03:56 What do you mean? My price, the price for... partsledger? How pricey I don't like the top them, I don't know.

QUINTON

1:04:05 Top of my head, to be completely honest with you, I can give you a ballpark of what like service trade costs from the select level without partsledger. Give me one second here. I mean generates a numbers. How many technicians would you guys have using the?

IPAD

1:04:20 Platform? All takes eight. So it's...

IPAD

1:04:30 13, 14 to 16 with the portal fall. Yes, sir. Yeah... two point four.

QUINTON

1:04:45 And... for you guys, is current information in acu in, is... is that include assets that you guys track that piece of equipment that you service?

IPAD

1:04:58 Yeah, like each customer side, because definitely, exactly, so like.

QUINTON

1:05:01 You guys have all that? Okay? Yeah. Alright.

IPAD

1:05:04 So, into the... the numbers? Okay?

QUINTON

1:05:12 Okay. So... for... for 16 technicians on our select level, that's our base level package including the service time card. In your first year, you have onboarding is kind of like what I was saying. Project manager, helping you set up your current system. We're also training you guys on how to use the software. So with onboarding in your first year, we Bill on an annual basis, you'd be about 23,200 dollars to get started. And then each year after that, for your renewal, it'll be about 16,900 for your annual subscription.

IPAD

1:05:51 16.

QUINTON

1:05:55 That's about 6,300 dollars for onboarding. So account set up training as well as added on in your first year. And then obviously, that drops on your two year three if you guys renew. So for your renewal, 16,900 for your initial 23,200.

IPAD

1:06:17 Okay.

QUINTON

1:06:23 Yeah. I can give you guys a breakdown too. So it's based on per technician.

IPAD

1:06:32 Yeah.

QUINTON

1:06:33 Yeah. Yeah. For sure. I can give you a, an itemized quote... break down the pricing.

IPAD

1:06:45 No.

QUINTON

1:06:50 What other questions do you guys have?

IPAD

1:06:56 We were just looking for a software that is going to be user friendly. You know, now, as far as we have any problems with... anything with the software, obviously, we could contact you guys... there's. Nobody, obviously, you have anybody locally here that we got to take the tablets to anywhere or anything but how, I don't even know how to phrase the question. Yeah, how, how's the extra for it? Yeah, obviously, you're gonna see is the radius in the world, but... but you gotta be honest.

QUINTON

1:07:30 Honesty is... is I'm... I'm as transparent... as transparent as it gets. But we backup everything with data and we actually just did a, I guess a pull in a survey and compared it to other different SaaS softwares. We actually came into the 99 percentile when it comes to response time for our customer success team. So on average, we're getting to our customers within 20 minutes of the call. And that's just on average, most of the time, it's even earlier than that, that's in the 99 percentile across the board when it comes to this service as a software platforms.

IPAD

1:08:14 Pretty good morning. It's hard to believe but it sounds pretty good.

QUINTON

1:08:18 We have data to back it up. I promise you it's not just coming straight from my head and I'm...

IPAD

1:08:22 Making stuff up.

QUINTON

1:08:23 We, we... we run... we run different reports. We... we generate data to kind of have those numbers.

IPAD

1:08:28 Provide to our customers. We're just giving you a hard time. I put, the thing is, yeah, the company's growing, our company is growing this headed towards that direction. We're actually into a bigger place. So, I know for a fact that company is going to get bigger. It's gonna... it's gonna do much better than a forward looking for a better software. You know, that's the reason why I'm wondering if we could, if we haven't we're going to be technical support. You know, that's fine. Yeah, I know work around and everything. But, you know?

QUINTON

1:08:57 Hello, no, 100 percent. I was a technician out in the field too, so I understand how frustrating when something's not working and you're trying to get a hold of, you know, someone in Asia who doesn't speak English. You know, that's not gonna happen with service trade. There's multiple lines of defense as well. So, like, for instance, hey, is your customer support that's the first number that you're going to call. But if you can't get a hold of somebody for whatever reason, you?

IPAD

1:09:21 Have your account manager and your project manager.

QUINTON

1:09:23 You're going to have direct lines of communication to get whatever you guys need really at whatever time. So, I'm... I'm confident that our support, it would be great for you guys. Now, you mentioned that you guys are growing service trade is specifically designed for growing service management. Our service management companies. We actually our customers right now, another status. They're seeing a 24 point three percent increase in service revenue year over year and it comes from being able to have an easy platform for your office staff and technicians to use.

--- Pricing ends ---

QUINTON

1:09:58 But it's cutting out a, those extra steps when it comes to generating quotes, waiting for work orders to get in. I'm getting out invoices fast to your customers. All that take is taking into account while also providing a better experience for your customers on the other end. So it's making you guys the easiest company to do business with. I'm kinda like Amazon, right? You just click on that by now button.

We kind of adopt that same type of customer experience where they can just either click approve or click pay now and, you know, services right on the way. So that's kind of our... our model that we... we... we try to provide.

IPAD

1:10:33 You have an example of what your dispatch board would look like, say, for example, right now, in your... in your example, so you've got a board with say they have 10 technician. Okay. There you go. Yeah... I didn't see it, right? Yeah, we can.

QUINTON

1:10:55 Real quick. Do you guys want?

IPAD

1:10:58 That's the only view. We can change it around like put the Pinterest on the top or something.

QUINTON

1:11:04 I always man, I waste way.

IPAD

1:11:05 You can't no instances out of the box.

QUINTON

1:11:09 It's it's pretty... it's pretty easy to use for instance, like when you have a call come in like an emergency.

IPAD

1:11:13 Call.

QUINTON

1:11:14 You can add a job directly from the dispatch board, for instance, like let's just say the Angus bar and wants to call, it's, gonna populate with your customers, you know, fill in those fields for, you... you can distinguish what type of call it is for a particular day and say, hey, what's... what's a common thing that you guys get calls for?

IPAD

1:11:37 It's not.

QUINTON

1:11:38 Unit not cooling.

IPAD

1:11:43 If your cost.

QUINTON

1:11:44 Knows what particular unit isn't cooling, you can select those units from or the list of the assets for that location and say something like fix on site. Now, once you hit save, it's, gonna fall into that on assigned bucket that top right hand corner. So I have to do is click into unassigned and then click and drag this down to whoever can take it. So it looks like we're at is actually done with that, but their job around 10 a. M. So I'll put this on the brits calendar. Drop it there. Breads notified directly on his device that he has a job scheduled. So he'll get an email notification, but it also show up in real time on his list of jobs to complete.

IPAD

1:12:27 So as soon as you drop it to Brett, he automatically gets it, you don't have to see. So if you can't... you can't put it on it and send it to say when he was done with that, but there are enough for free. So.

QUINTON

1:12:46 Great question. So, yeah. So... from... from my experience, you don't wanna, you know, a tech doing his current job and then like...

IPAD

1:12:55 Would like, okay, you gotta get to this job.

QUINTON

1:12:57 And the focus on completing that one and then released so on when he's... when he's finished with that job. Is that kinda... the... the idea?

IPAD

1:13:06 Exactly. Yeah, yeah. So we don't like to send all the calls at once, right? Right? Is that and then send them the mets?

QUINTON

1:13:15 Yeah, no, 100 percent. So, like if I'm... if I'm let's just say we're gonna stack reps, calendar. If we're going to give him a real hard time, I'm gonna give him a job here... and we'll give him a job late in the day.

IPAD

1:13:27 At five o'clock...

QUINTON

1:13:28 Corporate now has no.

IPAD

1:13:32 Before you say that chick fillet safe, you wanted to give them a timeframe of 11 to two o'clock can you spread that? Can you spread that out just to fill them up that... that area? Okay? There we go. I see.

QUINTON

1:13:52 Now check this out, so.

IPAD

1:13:53 I don't know if you.

QUINTON

1:13:54 Guys noticed though. We're filling up breads calendar and he has no idea. But as soon as Brett is John ton, with this Butler job, right? We can click in and we can see that Brett, okay, he was driving for 30 minutes to get there. It took some pictures. He repaired something and he was done with the job. I'm about 39 minutes ago. And there's a check mark there letting us know he's done now, when he's ready to have a new job, we have released button, we released that job to them. And now brits instantly notified that he has that chick fillet job. So you're not, he's not getting all that information at once. You can release that as the day goes... goes on.

IPAD

1:14:30 Yeah, that was my question. No, that's perfect. Yeah. Good for like where can we get started? No... well.

QUINTON

1:14:42 Well, I do have a question though you said you're looking for a software, do you guys have a timeframe where you're looking to have something in place by? And the reason I asked that is not like, hey, when can you sign it's... it's? More of we have service delivery when?

IPAD

1:14:55 Yes.

QUINTON

1:14:55 So, like for instance, right now, the earliest that you guys can start your implementation would be, I believe 11 one is our earliest service delivery window and it normally takes about six to eight weeks after that until you go live. So, if you have a certain date that you're looking to have something implemented by, I just kinda wanted to set that expectation of it's. Not just you get the software and boom, you're ready to go. If there's some training involved setting up and it starts on 11 one takes about six days.

IPAD

1:15:24 After that, but definitely, it... it has to be in the slow season and definitely, after my boss approves of it right? At the present, it to her, and it would for sure be after 11 one or it would probably be your next. I mean, realistically, it would be your next

open date where in an office building, we've been in... in at an, a warehouse and office that we've been out for five years and we're currently.

QUINTON

1:15:50 The process of moving.

IPAD

1:15:53 To another warehouse and we've got to be out of where we're at now October 30 first. So by the time with everything added here set up in a new shop, get situated there then.

QUINTON

1:16:07 He would be then.

IPAD

1:16:08 That would probably be our open timeframe there.

QUINTON

1:16:12 And that's... that's smart too. I don't recommend trying to onboard a new software and move locations at the same time. That would be an absolute nightmare, right? So, it sounds like October 30 first is when you guys would be moved into the new spot... right?

IPAD

1:16:28 Because they have anything left at our current location will no longer belong to us. So, yeah, we should, it's actually we're trying to get out of here the weekend prior to that, but, okay, it'll be that... that probably that last week, the end of October 14. How long ago?

QUINTON

1:16:49 You saying?

IPAD

1:16:51 Six to eight weeks for imports? Yeah, I think Steve, almost... six to eight weeks, six to eight weeks.

QUINTON

1:17:02 Sorry. Hey weeks is a six to eight weeks is what we recommend for how long it takes to get everything set up train and get and go live. Now, obviously, we've had customers do it quicker than that. It's just really what we recommend as a timeframe is normally what it takes to get everything situated before you're... you're... you're hitting the ground running. Okay?

IPAD

1:17:26 And in that timeframe not six to eight weeks, we continue using our current software. What we're currently using?

QUINTON

1:17:37 Something that you're you and your project manager would talk about. One of the things when you would sign up is you guys have a first, the kickoff call and essentially, it's... it's setting up a game plan of, you know, getting away from your current system and then moving over into service trade. Now, while everything's getting set up, you know, it probably makes sense to... to use them kind of entered our use acu in well service trade is being set up. And then once it's really, you guys are ready to go know how to use it, then you can make that transition over at once using them both simultaneously. Probably wouldn't be the best experience, okay?

IPAD

1:18:12 Hello? Hey, so back to Brad. Alright. So back to my grandpa Greenville chick fillet and each store or... can we put the po and the lead time on there and then move it to the date it's supposed to be done here?

--- Next Steps ---

IPAD

1:18:33 What else to say... say? It's like the big, the 20 eighth where it's supposed to get it in two days. So we won't do it till next Monday, right? Friday... Friday, October first. Can we move that call to Friday with po... and our lead time? 100 percent a detailed?

QUINTON

1:18:56 Yeah, you just go into that detail section. You can do that from here. You can just literally choose a different date to reschedule it for. But like, if you... if you want to see like, okay, there's some parts of that needs to be ordered, let's click into the work order.

--- Next Steps ends ---

QUINTON

1:19:11 With one click of a button. It's bring you directly to that text.

IPAD

1:19:22 This is... what, this is how it works. Great.

QUINTON

1:19:29 How's it going? Doing well, man? Okay. But yeah, on that work order that you can then see like, okay here's the parts that we need to order. And then you can schedule that job as well for heat from here also. So there's... there's a couple of ways to do it. You can even add a new appointment. So it, so like if you want that set the clock out here so you can see it's, still see. Okay, like he was, they're working from X

amount of time, but he needs to go back out there. You can add that net new appointments. That same work order, keep it all in one one section.

IPAD

1:20:05 That was pretty good.

IPAD

1:20:10 Yeah, I miss that. We don't record. We have a board that we right here with the wall.

QUINTON

1:20:20 Yeah.

IPAD

1:20:22 Well, that's pretty good. That's nice. Yeah.

QUINTON

1:20:25 Yes.

IPAD

1:20:28 Well, that's the training process. Okay? So you can learn.

IPAD

1:20:37 About... 12 weeks. No. Well, let us think it over that. So we... we have a, we have one more that we're... we're supposed to have a Zoom meeting also. Okay. Thinking over the past. Yeah, no, 100 per cent.

QUINTON

1:20:58 Well, do you guys looking at?

IPAD

1:21:01 I'm gonna also get a service tech.

QUINTON

1:21:04 Site. And yeah, they are, they're more residential?

IPAD

1:21:08 Really geared. We... we don't even really consider them like our competitors to because.

QUINTON

1:21:13 They had been predominantly in the residential space and we're more predominantly in the commercial space, but from what I've heard is they're trying to now go more into the commercial side of things. I do know that they are a little bit heavier on the pricing side. But yeah, they're... they're a great product, our platform for residential software for... for sure. So, what I can do is I'll provide you guys with the quote breaking down of what the cost would be that we talked about today. You said that you need to approve it from your guys his?

IPAD

1:21:50 Well, the...

QUINTON

1:21:56 Okay. When would it make sense then to regroup then kind of hear how you're meeting with service tight, and when we can go over the quote that I sent, answer any questions and kind of see where you guys are at as far as making a decision?

IPAD

1:22:12 We get a copy of this view. Yeah, yeah... yeah.

QUINTON

1:22:18 Good morning from today.

IPAD

1:22:21 Yeah, yes. And that's a recording. Most likely, you're probably won't hear us actually moved to a new shop. So I will make a decision to.

QUINTON

1:22:32 Okay.

IPAD

1:22:35 I'm... 30 first. Yes, I'm sorry, yes, exactly.

QUINTON

1:22:41 Once it going guys, this is not me saying, hey, I, once you sign now, it's more of just kind of setting the expectations down the road. If you're looking, if you're kidding. If you're looking to go live and have something in place once you guys move in, right? If you wait till November to make a decision and sign up, that service delivery window would probably be pushed out past October. I'm assuming one thing that some of our customers do that, huh? But an idea of when they do want to go live is you can sign up with service trade and set your own window to start. So you're not having to go back through kind of the evaluation process or waiting down the road, signing up and then having to get... to get a service delivery window that might be pass the time that you want to start. So you do have the option of, you know, if you determine that service trade is the right fit after you look at other platforms and speak with your owner, you can make that decision now and pick your date rather than waiting and have my, I have a date that my.

IPAD

1:23:41 Pushed out.

IPAD

1:23:46 So the mission critical? Yeah... that just Eric up into this... I would guess. Did you could just give me a break down the quote? We could... we could be at the technician and the reporting. That way I can show it to my... my boss and then we can make a decision before we'll let you know.

QUINTON

1:24:13 Sounds great. Guys. Is it cool then, if I reach out to you guys, maybe next week to kind of hear how the meeting went and see if I have any, if you guys have any questions that money and... and?

IPAD

1:24:25 Yeah, yeah.

QUINTON

1:24:30 Us for y'all.

IPAD

1:24:33 You know what? My boss is going out of town... today... tomorrow? Can you give me the following week just to make sure? Okay, sounds good.

QUINTON

1:24:49 What day works best?

IPAD

1:24:59 Not this coming Tuesday, but the follow give you like a... 1,212 o'clock you said on the twelfth of October?

QUINTON

1:25:11 Twelfth of October. Gotcha. Yeah, I'm completely free that day. So, any time that works best for you guys, I'm like shoot you over an invite for a quick call.

--- *Wrap-up* ---

IPAD

1:25:23 You gotta that. Any does work?

QUINTON

1:25:28 You want to do the same time then drip promise, I won't... I won't be late the.

IPAD

1:25:33 Yeah.

QUINTON

1:25:36 Sorry about that again. Well, cool guys. I'll... I'll do that. I'll send you over a calendar.

IPAD

1:25:39 Invite for the twelfth.

QUINTON

1:25:41 For the same time that was today, send you over some pricing and the recording of our demonstration today. Once again, as you guys review this information with your team and have any questions, feel free to reach out to me. And it was pleasure speaking with you guys.

IPAD

1:25:56 Likewise. Likewise. Thank you for your time.

QUINTON

1:25:59 Yeah, absolutely. Yeah. You guys have a good one.

The End