ServiceTrade Mobile App Refresher w/ Murphy Company

Matt Hetrick with Murphy Company
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Transcript

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LINDSAY

0:00 Morning?

MATT

0:01 Hey, it is morning, your time actually.

LINDSAY

0:03 Guy was gonna, well, I was like, maybe I should say, good afternoon. I don't know.

RYAN

0:07 Good.

MATT

0:08 Afterning good afternoon... hey, Ryan.

RYAN

0:12 Matt, how are you?

MATT

0:13 Doing very well.

RYAN

0:16 We're doing well. How are you feeling? How's it net?

LINDSAY

0:21 Pretty good. I'm getting good reports at PT. So.

RYAN

0:25 You go.

LINDSAY

0:26 That's a good thing.

RYAN

0:27 It is for sure.

MATT

0:29 How much longer you got to go on your journey?

LINDSAY

0:32 Let's see. So today, I'm three weeks post surgery, and then I have three more weeks where I have to have my leg locked out in a brace. And then I'm very slowly bending it while, like while I sit down, I can bend it right now. I can bend it 30 degrees, which is like it's kinda like this, you know?

--- Pricing ---

MATT

0:50 Okay. That's 41 degrees.

LINDSAY

0:52 Yeah. So I have to get, so I'll be in that for four more days and then I'll go to 45 degrees for five days and then, yeah, 15 degrees per five days, so.

MATT

1:02 Wow, small steps, right? But I...

LAUREN

1:07 Sounds...

MATT

1:07 Like you might be ambulatory by summer.

--- Pricing ends ---

LINDSAY

1:11 Yep. I'll be able to walk with the brace on at six weeks and after six weeks, I don't have to wear the brace, but I'll be very carefully walking at that point.

MATT

1:20 Love that. Awesome keep.

LINDSAY

1:24 Thank you. Yeah, it's quite the.

MATT

1:27 Good.

LAUREN

1:27 Morning. Thanks for coming in.

RYAN

1:29 Hello?

--- Purchase decision ---

MATT

1:32 Are we expecting Alex by chance?

RYAN

1:35 Yes, he will be here. He was coming back from a meeting, so he should be walking in any time, so we can probably go ahead and get started if you want. Okay, I think you gonna come into my office here is my guess.

MATT

1:51 Perfect. Perfect. So, before we kick things off and take another trip down the mobile app, memory Lane here was just kinda curious to touch base with you guys on your evaluation as a whole. So, I know last time we looked at the dispatch board that looked like it was very interesting and would be valuable for you guys? And Chris mentioned wanting to get some customer references, which we're still in the process of coordinating, but I was wondering for you guys, are you still looking at just service trade and BuildOps? Have you expanded that list to other platforms? What are you guys kinda doing in the background? You know, outside of the service trade meetings for your software evaluation?

--- Purchase decision ends ---

RYAN

2:38 As far as I know, it's predominantly been you all in BuildOps at this point. Now, I can't speak to Chris. Sometimes he's got some stuff going on in the background or other conversations that we're not 100 percent always privy to with the amount of different people he interacts with all the time. So there could be somebody else. But as far as I know, and the ones that we've chatted about, mostly, it's been you both.

MATT

3:00 Okay.

LINDSAY

3:02 The only third option would be basically like staying our platform as is and trying to build around it, but I not our preferred but.

RYAN

3:10 Yeah, that's...

LINDSAY

3:12 In the, in the meantime, what we're also working on and making initiatives.

MATT

3:18 Okay. Agree. And welcome, Alex. Thanks for joining.

ALEX

3:22 Thank you guys. Sorry, I was saying a little bit.

MATT

3:24 No worries. You're really right on time. We're just barely getting started here. Cool. Well, well, that's good to know. I know sometimes, you know, evaluations are living breathing things and things change. So we just like to make sure that both sides are up to date on that. So I have the mobile app pulled up for service trade and I have my own little idea of how I'm gonna go through that. But before I do, you know, in case, I can help kinda tailor this for you guys would love to know if there are particular aspects of the mobile app that you guys are interested in learning more about?

LINDSAY

3:59 For me, you know, of course time entry is always something that people wanna see, but the purchase order process, how they get POS and refrigerant, how they use refrigerant, how they complete equipment forms. Yeah. And then maybe some, if there's any reporting, like how do I see my weekly time sheet? What I've submitted? Or my refrigerant, you know, bank that I have, or anything like that. All of those would be important for me.

ALEX

4:27 Yeah, I would agree with that as well.

--- Parts management (inventory) ---

ALEX

4:28 The one other thing I would add on is probably different kinds of forms. So we're filling out PM forms touching on the refrigerant side, like the tracking, how you guys track inventory or truck. And I think the reporting side of it is really huge. Something that we've really been working on is trying to get KPI'S for our technicians to really dive in and be able to see exactly how each technician is, and making sure that we're making money when the technicians truck is moving and not losing money that standpoint.

--- Assets ---

ALEX

5:00 And I think really just the overall how's the service ticket? How does it look like another thing is equipment and management of assets or customer and customer location to be able to really dive in and say, hey, we spent X amount of dollars on this unit from a sales pitch from, you know, for our sales team to be able to say, hey, you know, obviously we spent 5,000 dollars on this net repairing it. Maybe it's time to replace it.

RYAN

5:28 I would agree with all those things in regards to kind of the asset tracking the visibility for that technician to see what work has been done at that customer's location, and on those specific pieces of equipment... in a, you know, efficient way of getting to that information ultimately.

--- Assets ends ---

RYAN

5:49 And then is there a way on the reporting side to see from a technician standpoint? What all assets they've charged out over a period of time for their trucks? And then are there any type of like auto prompts that can be built into the system to make sure that a technician is doing something before they can either close out or move onto a next step potentially.

--- Forms ---

ALEX

6:13 That's huge right there, Ryan. Thank you for bringing that up just making sure because right now our system, like if we have to fill out a form, for instance, like our tracking or the back or report, or even our PM report right now, our system doesn't require it. So you guys can go in there, submit the ticket and never fill it out. So if there's something within your system not allow, hey, now you got to fill out this form before you can actually submit the ticket? And another thing is to see if we go guys dispatch a work order today.

--- Tech On-site ---

ALEX

6:48 We want to really focus on the guys submitting time every single day. Can you go back and fill out time for that work order? Say three days later or not? Or is there a way that we can say work has to be completed? Tickets have to be completed today and there's no moving forward. We can't do it tomorrow.

--- Tech On-site ends ---

MATT

7:07 Yeah. I think I remember that one coming up when we last spoke whether you can go back into a job, you've already closed out and adjust your time. I remember you guys saying that you don't want text to be able to go back and adjust time.

ALEX

7:20 Corricht, okay.

LINDSAY

7:26 At least not after the work orders closed like that. Yeah, that would be a deal breaker after the work quarter is closed since we've already billed it, but, yeah.

MATT

7:34 You and I... were gonna take so much time.

MATT

7:48 Okay. Yeah. So I did look into that question currently, as it stands with the with service trade... text can currently go back and edit time on jobs that have been closed. But one way that you can prevent them from doing this is to make what we call unreleasing appointments part of your job completion process. So, as you complete a job, if you click and unrelease the appointments on that job, it would.

--- Access to information ---

RYAN

8:17 We'll...

MATT

8:18 Remove those jobs from the technicians completed bucket on the mobile app, so they won't have access to the job anymore. So there is a way to do that.

RYAN

8:24 Perfect.

ALEX

8:25 Matt, let me ask you, I guess. And you guys got feedback from other customers. What was the reasoning to allow technicians to go back?

--- Access to information ends ---

ALEX

8:34 And at a time, I'm just, I just feel like an accounting nightmare from my standpoint like, hey, we close this out potentially. We know X amount is our cost. And then having a technician add another two hours to that work quarter, what was the thought process there? You?

MATT

8:49 Know, I'm not sure what the thought process was. It's possible, it could be more, they didn't consider how that might affect the cost. There might be reasons that they built in that flexibility. I think primarily you'll see in service rate that there's not a lot of shop callers or, you know, guard rails for the technician and that's not so that technicians can be sloppy and disorganized it's to remove.

LAUREN

9:13 Move any.

MATT

9:14 Obstacles from them out there, keeping up with the fast pace of the service world. So, at the end of the day, if we, you know, we aired on the side of making it more flexible than controlled and, you know, rigid so that we can allow the technicians to get through all the different variables and stuff that they encounter out there a lot of times.

--- Tech time tracking ---

MATT

9:31 Because of the fast pace of what your technicians are doing, they may remember a detail after the fact and go back in and correct, or maybe the dispatcher catches them at the end of the day and said, hey, it looks like it didn't clock out or did you really use all this time on a job, then they have the flexibility to go back in and make those changes.

--- Access to information ---

MATT

9:49 But I certainly see your point and it wouldn't surprise me if that is something that does get changed in the mobile app because you're right after the office has already reviewed embedded a job and closed it out. It doesn't make any sense for the technician to be able to go back and change that.

--- Access to information ends ---

MATT

10:04 And if a change does need to be made, it would probably make more sense for the office to do it, somebody with a little bit more authority, so.

RYAN

10:11 Yeah, for someone.

ALEX

10:12 That knows about it.

MATT

10:14 But I will say this, I'm glad you guys were able to see the dispatch board because it's proof of two things. One that service trade is not a static platform and that we're constantly evolving and improving. And two, that those improvements and changes come from conversations exactly like this. So at any point in time, if, you know, I say today it doesn't have it. I don't want that to discourage you because a lot of your, all of your suggestions I've heard thus far have been extremely valuable, logical. And I don't see any reason that they wouldn't make it into development for service trade. So keep that in mind too. You guys are the ones that we want to hear this feedback from and develop our product accordingly.

ALEX

10:56 That's something new for us. I'll tell you that we're not, I just system we're currently, is, it's just been like, hey, this is it. And that's it kind of deal. So that's the fact that you guys are always willing to evolve and develop and put resources.

MATT

11:14 Yeah, I'm sorry to hear that's been your experience this far? Yeah, I don't know if we've mentioned it already, but annually we hold what's called a customer advisory board where we invite our customers out to get a sneak peak of our road map and vote on different features and things that we're considering working on. And that's how we actually shape and develop our road map is feedback from you guys. We're heavily invested in that area of our product development. Okay? Did you have any questions or anything to add? No... very good. Well, I'm gonna touch on as much of these things as I can. Anything that I'm not prepared to show. We'll have more of a conversation around and if we have to, we can always set up another demo to cover a certain area in depth.

RYAN

12:08 Let me get my screen situated.

MATT

12:10 Here.

--- Access to information ---

MATT

12:30 Okay. So you guys can see my screen?

RYAN

12:33 Yes.

MATT

12:35 Good. So this should all look familiar. This is the office view. I just like to start here to show you the job that we're going to be doing out in the fields. You can see how the stuff flows back to the office in real time.

--- Recurring maintenance ---

MATT

12:46 So, this is the office view of a job. And you probably remember that in service trade, we call work orders jobs, and we've got a preventative maintenance here. So down below, we can see the Bill to address ship to address the service site where we're delivering the service.

--- *Assets* ---

MATT

13:02 We see the appointment details. We see the technicians assigned to this job, and we'll see that we're doing a quarterly maintenance on this group of rooftop units.

MATT

13:15 So when we pop out to the mobile app, the technician is gonna have a few different ways of looking at their work.

--- *Assets ends* ---

MATT

13:22 So right now, we're looking at all scheduled jobs, right? And I've kept it simple. I've just got one job assigned today, and I have my view filtered by today. So if you've planned out your...

RYAN

13:33 Technicians were.

MATT

13:34 Like a month's worth of work instead of showing them that list simultaneously and overwhelming them, they can filter it down to just the date so they can see what they have to get after in the immediate future, but if I toggle that off, of course, I can scroll out in the next week next month and I can see all of my upcoming work in case I need to prepare for... it.

RYAN

13:57 Scheduled date, Matt?

MATT

13:59 What's that?

RYAN

14:00 Who picks that scheduled date like filter by today, in the technician change to put more jobs in today's, status or does that have to be dispatched?

MATT

14:09 So, that would have to be dispatched, but I'm curious why you ask that question.

RYAN

14:14 So, if the technician, you know, this is what they have today, the kroger all of a sudden, they wanna move something else around. Is there a way that they can kind of build their own, I guess schedule for the day or they just go into that work order and choose it and then they're good to.

ALEX

14:28 Go, so.

MATT

14:29 Yeah. How do you, how do you guys currently do that? Do you currently have technicians kinda driving their own schedule?

--- *Recurring maintenance* ---

RYAN

14:35 In a lot of cases, yeah.

MATT

14:37 But...

RYAN

14:38 We don't have anything that's set like a filter for today. It's just a list of all their work order.

MATT

14:43 Okay.

LINDSAY

14:44 So, for example, Matt, you know, their, they may have five maintenance visits generate and we assign them all to them on the first of the month.

--- *Recurring maintenance ends* ---

LINDSAY

14:52 We want them to be able to see all five of those no matter if or when they're scheduled for, just so that they know, hey, my gosh. I've got five of these, I'm running by this side. It would make sense for me to stop over here and knock this out too. We want them to have some empowerment around that schedule and it not be locked in so tightly to like here's. What's assigned to you today, and that's all you can see.

MATT

15:15 Yup. Yup. So that's a good call out what this is showing your schedule jobs is, this is, these are all jobs that have particular appointments times, dates, right? But what you might be referring to there in the context of a preventative maintenance, is that has a month long scheduling window that maybe you don't have a specific agreed upon time with the customer. So, for that type of job, they're always going to be able to access what's called the unscheduled bucket. So, these are all jobs that have been assigned to the technician, but it does.

LINDSAY

15:45 And...

RYAN

15:45 Have one?

MATT

15:46 Of those specific appointments, which then gives the technician the creative control to knock these out as they see fit. So if they just finished up, you know, a demand service call, but they don't have anything on their schedule for the day, they can look into unscheduled and they can see these different maintenance they have to choose from. But then they can also do things like sort these jobs. So in the upper left hand corner, they can sort by what's due soonest, what's priority or even what's closest to them. So it'll actually take their location, compare it to where the jobs are. And then more to that point, they can actually view their jobs on a map. This is a demo account. So we got jobs all over the United States. You probably don't have your technicians crossing the country for different jobs, but each one of these pins represents a job. And actually, I'm in North Carolina, so.

ALEX

16:36 Over here.

MATT

16:37 So here they can actually see where they're located and they can see what the closest job is to them.

--- Tech On-site ---

MATT

16:42 So then they select that they can see, you know, what the work order details are, and then they can clock in on that job, right from there.

ALEX

16:51 So...

RYAN

16:51 This because we don't...

ALEX

16:52 Really like schedule. Hey, we're gonna be there at one o'clock and I think we're gonna look more in the unscheduled tab.

--- *Tech On-site ends* ---

RYAN

17:00 What's the?

ALEX

17:00 Flexibility of like configuring the view of this app to like get rid of schedule. Is that possible? Or is that more of an internal?

MATT

17:09 So doing that would affect everybody using service trade. So that's not likely to change. But I will also say this a lot of times you might be scheduling jobs where you don't have specific agreed upon times for the customer. But by having those times in service trade, it can simply serve as an ordering function. So if your dispatchers or your schedulers have optimized the technician routes, they've already looked at the map and they've identified that this is the best order in the most efficient to cut back on windshield time, you might still want them doing it in a particular order, but they don't necessarily need to be overly concerned with making there, you know, right at one o'clock so you still do have flexibility with the schedule tab.

--- *Tech On-site* ---

MATT

17:53 This would just be the better place to order it for a tech, if you had a desired order of operation. Does that make sense?

ALEX

18:00 Yep, absolutely. And then I completed tab. How far back does that go?

MATT

18:08 So completed, it goes as far as I know, let's see. I've got a long list here. Lauren, do you know off the top of your head how far back it go?

LAUREN

18:18 I... think it goes back as far as time. But when I know that's a silly answer. But I think once the office marks one of these jobs as complete, they disappear from this list... I will work on confirming that just so I'm not sharing incorrect information with you. But I believe once the job is marked as complete in the office, it disappears from this list.

ALEX

18:46 So if we had a technician that really goes above and beyond it, once you check this completely list, they can actually tell which invoice actually went out to the work order. So if it's not on this list, they can assume that the work order went out for.

MATT

19:02 If that's if Lauren hypothesis is correct, then yes, that would be the case.

--- Access to information ---

MATT

19:08 If the tech were going to concern themselves with the office staying on top of the billing, then they could do it that way if that's how it works. Yep. And so in here in the mobile app, I just found one back in November of 2022 so it has quite extensive history. But this is as you have noted, this is just looking at the jobs that the technician.

--- Assets ---

LAUREN

19:32 I has completed.

MATT

19:34 Assured when we get into this job and I'm showing you service history, you're going to be able to see all of the past jobs that any technician has done like on a particular unit. So that history which is potentially what is going to be more valuable to you guys is not limited in time frame.

--- Assets ends ---

MATT

19:58 Any other questions about the difference 10?

LAUREN

20:00 Scheduled and unscheduled here?

MATT

20:06 Okay. And one more question I have for you guys. Do you typically want your technicians being able to see out ahead of the next week or next month and see all their upcoming work.

LINDSAY

20:17 Yes.

MATT

20:18 Okay, good. So I was also gonna call out that the office does have the ability to release an unrelease appointments.

--- Access to information ---

MATT

20:25 So if there were certain text you didn't want them seeing too far ahead, you can actually control what jobs are kind of fed to them or what they can see on their mobile app. So I'm gonna open this job up which is the one that we were just looking at in the office.

--- Tech On-site ---

MATT

20:41 And this should also look familiar. When the technician opens up this job, they're gonna see eight different tiles of information about the service, the location, the equipment. But down here at the bottom here's where we have those clock events and there's three to choose from. So depending on how you guys want to track technician time, there is job prep. The time it takes to gather materials or go to a parts house in route is one of the more common ones. So this is where the technician is leaving the office or the previous job, they can clock in route and it's gonna keep track of all their drive time.

--- Customer engagement ---

MATT

21:17 And then this is also where that customer engagement comes into play that we talked about. This is where the technician has the ability to notify the customer, let them know that they're on their way. So again, more of that Amazon prime, Uber domino's experience to engage the customer, make your relationship stick here, exposing to your branding.

--- Tech On-site ---

MATT

21:39 And then of course, let's say we arrive on site. We clock out in route service trade is gonna ask us ready to get ready to get ready to work. And we're gonna say, okay, it now clock in on site and it's keeping track of all of our time at this location.

--- Tech time tracking ---

MATT

21:52 The thing I like to call out here is these clock events are not going to automatically apply labor to the job. Most people don't want that. Anyway, they serve primarily as a cross reference for you guys to be able to see how the technician is using their time.

--- Customer engagement ---

MATT

22:06 And you can account for things like drive time, even if you're not necessarily billing the customer for drive time. So it's just a good record to have in the background to see how your technicians are using the.

LINDSAY

22:16 So you guys are seeing customers that are customers of yours that are contractors like us that are not billing drive time.

--- Tech time tracking ---

MATT

22:24 So not all of them, some people don't build drive time.

LINDSAY

22:27 Okay.

MATT

22:28 Yeah.

LINDSAY

22:28 I'm surprised to hear that because we all Bill drive time.

ALEX

22:33 So things that another department refrigeration, they actually, their customers wanna see the drive time, so.

LAUREN

22:41 Right.

ALEX

22:41 Now, within our current system because they're refrigeration department, which has a different view, whenever technicians assign a under that they're required to put in the drive time just because it's driven from the.

--- Tech time tracking ends ---

MATT

22:55 But like...

ALEX

22:56 Service site, we don't drive time. We just say, hey, we're leaving going to your site. TAM that starts then that.

MATT

23:06 Okay.

ALEX

23:06 We'd be able to break that up by different departments when it is required and not required.

MATT

23:14 So say that again.

ALEX

23:17 Well, we'll be able to like divide it.

--- *Tech time tracking* ---

ALEX

23:19 So say our refrigeration group has to have drive time on their actual service tickets. So their customer wanna see, hey, it took me 30 minutes to get to your site. And then I started working and I worked there for three hours. So our ticket will come out as, you know, 30 minutes of drive time, three hours on site for our service side. And Lindsay out of Denver, we just want to have a ticket that's gonna say we've been this work or a three and a half hours total?

MATT

23:46 Yeah. So that would be more of a protocol. And so that you guys would have in place for the refrigeration department, there is a way to show your customers the clock events, how the technician was spending their time on that job. I believe the default has it set off. We can look into whether or not you can adjust those defaults based on division. I'm not sure on that. But basically, the refrigeration department would, is always turned at that toggle on showing the customers what the clock events are, and everybody else would just leave it as it.

ALEX

24:20 And then you said this actually won't be for their labor hours of hours that the guys get paid for? Is there a way to make this be their actual time that's being submitted to payroll?

MATT

24:32 Yes. Yep. So a lot of companies choose to pay their technicians based off of billable time, which would be the labor hours that you put on a job that you're billing the customer for. But one thing that will show you a little later on in this demo is you have the option of doing either. So you can use the clock events to pay your technician, which is the actual time you know, the in route job prep onsite or you can choose to use the labor items.

LINDSAY

25:00 You, can you also, and I'm sure you'll show this, I'm kind of jumping ahead but can you also just enter time? Like if the text like, yeah, four hours that's how much it was?

MATT

25:09 Yeah.

LINDSAY

25:11 I, Alex, I'm really nervous about this specifically just with, you know, tech accountability on this is a lot to ask.

ALEX

25:21 I couldn't agree more. It'll be a, it's a big culture change for us current. So, our guys right now, I will tell you 99 percent of them will go to a job site because they know our customers, they know who's calling, they know the directions. They don't have to look at the maps they'll get on site. They'll get their job done, hopefully jump in their band afterwards and just fill out, hey, on there for three hours. Yeah, put in the work description call today. They're onto their next call or do that at the end of the day. And just in the full eight hours, have five stops at an hour each here's. My five hours for the day and that's it.

LINDSAY

25:54 Yep. I just, I don't know if we want to go down this path, but I'm just throwing that out there.

ALEX

25:59 Yeah, no, that's good.

MATT

26:03 That being said, it would be very easy in service trade to still have that workflow if you want them to just put in comments, all the parts they use, the time they spent on the job. And then you guys put that stuff in yourselves in the office, you can do that. A lot of people find that doing that same thing instead of in a comment is just as easy doing it under the job items section where they're reporting. Hey, they use a capacity or they use a filter, a belt and they had this many hours of labor.

--- Parts management (purchase orders) ---

MATT

26:32 But you have that flexibility, you can absolutely do it from the office if you want. Okay. But on that note... is that how they're putting in parts that they use for the job? Or they're just putting comments on the ticket saying I was here for this many hours, these are the parts that I.

ALEX

26:47 So right now, at least in a WS, we're having most of our guys if they need parts for work quarter to get a po and just purchase the material. We're following that material cost the guys. They're really just putting the work description. Hey, I went out there. I changed the compressor.

--- Parts management (purchase orders) ends ---

ALEX

27:06 I did XY and Z. Now, when they actually bought the compressor, they bought on a po that is tied to.

RYAN

27:14 So.

ALEX

27:15 Sure. So we're making a little bit of a shift that the guys selecting what they're what they used and just scripting it to, hey guys need things.

--- Parts management (inventory) ---

ALEX

27:24 Let's get rid of the truck stock that we all love to have on our truck because otherwise we got dress similar trucks to be able to have everything with us. Let's just buy everything to the order. Then I guarantee that we're gonna pay for it or fill it out to the customer.

LINDSAY

27:38 The only inventory that we carry is refrigerant, so that we're you know, that we're planning to carry is refrigerant. So everything else is just purchase orders. So we wouldn't want anything in the text boxes. We would definitely wanna, you know, in our mobile app. Basically, there's ways for them to either select things or the POS show up. Everything is like a hard record. There's no, you know, in the comments or anything like that.

--- Assets ---

MATT

28:02 Okay. Yeah, that's perfect. Okay. Yeah. And when we get into this section of it, that will make more sense. And I'll show you what the process is using partsledger to for the technicians to order parts from the field... while we're on it for comments, this is where the technician can add a comment that can either be specific to the job or specific to a service.

--- Tech time tracking ---

MATT

28:28 But then this is all information that your office is going to be able to see in real time as well. So here, if I wanted to say I spent five hours, I can do that, and then... that would be something that the office could review and add in those five hours. If that's how you wanted to do it?

ALEX

28:49 Well, we would want the guys to be able to actually submit the time.

LINDSAY

28:52 Yeah, the text should entirely submit the time, but let's say like he forgets to click the button to kick it off. Is there somewhere he can be like, okay, I had five hours on this job. Yeah, we would want it entirely done by the field.

--- *Quote templates* ---

MATT

29:06 Okay. I misunderstood. Let's get into that now. Then we'll just open up job items. So I already had some items pre populated to this work order and you can see here, these are the hours that I was expected to use on this job because that's how much it usually takes.

--- *Tech time tracking* ---

MATT

29:25 But here, the technician... if two hours was fine, this is where they can mark that they were used. They actually applied those two hours to the job. But if they needed more time, it took them three instead of two. This is where they can adjust that time right here.

--- *Tech time tracking ends* ---

ALEX

29:40 Matt, it could be just my screen. I'm still seeing the main.

MATT

29:43 I'm sorry, I had paused my share. I'm sorry?

ALEX

29:47 Okay, perfect.

MATT

29:48 Yep. Let me back up and show you that again. And you guys must have missed where I left the comment too. Yeah. Yeah. Okay. We'll go into job items here.

--- *Quote templates* ---

MATT

30:00 These are the items that I already have pre populated to the work order, right? And these are, this is the used versus expected to use, right? So we expected to use two hours on here. And if that was accurate, I can just mark those as used or if I want to edit that instead of saying two hours, let's say that it was actually three that's where I can adjust it right there.

--- Tech time tracking ---

ALEX

30:24 Can you do a half hours or is it just only by four hours? And how much can you break it down? Can you do like a 15 minutes? You can do anything you want on... that?

MATT

30:37 I don't know what a thirteenth of an hour is, but.

ALEX

30:41 So, we have a customer actually that's requesting us to do PMS per piece of equipment and it takes us like five minutes.

--- Assets ---

ALEX

30:48 So our current system, we can only go by it's 15 or 30 minute increments. So to be able to break that down to where you can say five minutes on this piece of equipment.

MATT

31:00 They have, you guys do it per piece of equipment?

ALEX

31:03 Yeah.

RYAN

31:05 Quite a bit. It may not be five minute inspections but we do per piece of equipment quite frequently.

ALEX

31:12 And Ryan, so was going, you know, we do the daily logs and walk it around. We had to actually build something outside of our system through smart sheets to bring it over because it was like I took 10 minutes and 50 or whatever it was 10 minutes on these two pieces of equipment or I use 15 minutes on the, on this one piece of equipment. So that's kinda.

--- Assets ends ---

MATT

31:35 Yeah, sounds like a lot of work but yeah, you can absolutely do it here as well.

LINDSAY

31:40 I'm a lot meaner than these guys. I tell those customers that we can calculate it for them but not do it on the paperwork.

MATT

31:47 It was.

ALEX

31:49 On trust me that's the only recent.

MATT

31:53 Yeah, they're pretty big. So this may not be what your typical scenario looks like where, but it also could be for preventative maintenance. S, a lot of our customers will want to have the filter list, the belt lists, you know, on the work order as an indication of technician.

--- Parts management (purchase orders) ---

MATT

32:11 Hey, this is the stuff you're expected to use out there. A great way to prepare their trucks to make sure that they have all that stuff. But let's say if this was a demand call and I needed to order something from the parts house, this is where I'll open up the partsledger mobile app and you'll notice that because I'm clocked into that job, it automatically populates that job number.

--- Parts management (inventory) ---

MATT

32:31 Now you guys are keeping truck stock. But if you were, you could enter the part number that the technician needs or the technician could enter that part number, and they could actually look up the stock to see what is in stock and where it's located. So if there was some at the main warehouse or maybe there was some on one of the fellow technicians struck down the street, they would be able to see that stuff.

--- Parts management (purchase orders) ---

MATT

32:50 But since you guys are ordering primarily directly to jobs, this is where they would generate a new po, so they can select their supplier and you'll have all your vendors loaded into partsledger... and then they create a new po. So it's automatically going to generate a po number for them.

--- Parts management (inventory) ---

MATT

33:12 In here. They can do a message which is optional. But now they're just entering the parts that they ordered at the parts house and it's a smart look up. So they just type in a few characters of that part name, or code or description? It's gonna narrow down the list to those few characters that they entered.

RYAN

33:32 Now.

LINDSAY

33:33 Is there a database somewhere that has all those in that?

MATT

33:37 Partsledger. Yeah. But are you, Lindsay, are you asking because maybe there's an ad hock item that isn't in a database?

LINDSAY

33:46 There, there is no database. Yeah, it would be like random super crazy stuff, thousands of them.

--- Parts management (purchase orders) ---

MATT

33:57 Yeah. So they can do that too. And if they know what the cost is when they go to the part vendor, then they can add that in here but they may not know, and therefore they just put in a placeholder like a Penny, right? And then the office will fill all that information when they get the vendor. So you purse your lips, Lindsay, what are your thoughts on?

LINDSAY

34:17 Well, technicians would never enter line items. I don't think that's realistic. So, like we got a, we had a po the other day that was 58 line items. So I would need a way for them to take a picture of an order sheet, add it on here. Put some header information and put the cost in and the quantity in the vendor and take a picture of the order sheet and put it in here. And then the po is created.

MATT

34:46 Perfect. Okay. So I'm picking up a box of stuff. It's cost a Penny or maybe I know the actual cost. I can put that in there. Okay? Adding that item to the po, and I'll get rid of this. I'm gonna leave those two items on there. And then I'm gonna finalize the po. And so just as you said, I've got these items on here. Now, I can take a picture of the po.

--- Parts management (purchase orders) ends ---

MATT

35:21 That's what I ordered.

LINDSAY

35:23 That's just sitting there on your desk.

MATT

35:26 Yeah, it's my nice gave it to me and so I told her I keep it on my desk as a reminder of her.

RYAN

35:32 That's ideal.

ALEX

35:34 Let me ask you this. If the guys didn't fill out any of the line, I just took a picture and uploaded, it will generate a.

--- Parts management (purchase orders) ---

MATT

35:42 So you have to have at least one item.

LAUREN

35:43 There, but...

MATT

35:44 They don't have to be specific. It's just, it's it can be more of a placeholder. And then you guys can unpack all that stuff when you receive the actual vendor Bill, but yeah, you can't submit like a po with nothing on there but a picture.

LINDSAY

35:56 So, I guess so here's kind of like how our data structure is for our po. So I'm trying to figure out how we can get to this. So on the header record of the purchase order, it has, the vendor has a total number of line items and a sub total of the cost. And, you know, maybe a text box of like what are you buying here? Your box of stuff? And so that's the header record and then what you just entered as a line item. So that line item would go into the po. But then I'm creating a bunch of manual work on the back end. When really I want to automate this entire process. So I wanna take that order sheet. I wanna use OCR or I wanna source it to a transcription service to key in the line items and then use robotic process automation to drop it back into either into service rate or into the ERP, wherever it needs to go. But if I put it in the line item now, I've got kind of like a broken situation here because I'm not planning to touch them in the office. When this is all said and done. I don't want anybody in our office going in and looking at invoices and keying line items.

--- Parts management (purchase orders) ends ---

LINDSAY

37:08 So I'm trying to collect the right information on the front end in the right places to get to that automation... if that makes sense?

MATT

37:18 It does just to recap. So you don't want the technician to put in items and you don't want the office to put in items, you want to just form a bunch of items in there?

--- Paper process ---

LINDSAY

37:29 No, I'm not expecting for you guys to do that, the system to do this, I just need to collect the image and whether I, you know, do it with OCR, which will be challenging, which is the, you know, automated reading or I, you know, in the past, I automated a po process and I sent all the order sheets over to India and they transcribe them overnight.

--- Paper process ends ---

LINDSAY

37:47 And then we had a, we had a robot pick up the line items, they transcribe and drop it into the accounting system. And then that way nobody touches it, you know, and I pay 300 dollars a month to get them transcribed. And then I don't have people in the office that are costing me, you know, 30 dollars an hour working through this process.

MATT

38:08 I...

LINDSAY

38:10 So any solution that we do, I wanna make sure we're set up to go down that path.

MATT

38:15 Yeah, that's an interesting one. I haven't heard that especially, I love the idea of outsourcing the busy work to India. I love this.

LINDSAY

38:25 And that's a little different, but, you know, that's my, our end goal for this process is that we really just hide it in the background and don't send anything back to the office to be configured typed or anything?

--- Parts management (purchase orders) ---

ALEX

38:36 Matt, what about the vendor itself will send over the EDI or send over the line items? How would that work? Like if the guy I guess put in box of stuff for 978 dollars, and we had EDI from over three overnight, fill it in for line items. Will that double... or?

MATT

38:59 So, a lot of these questions are in the.

LAUREN

39:02 Office view of partsledger.

MATT

39:03 Which I think we showed you guys. And if we have to, we can do another tour through that sometimes. But... the general way our customers use partsledger is it's usually either the technician itemizing those things out or if the office doesn't trust them to do a good job of it, then they'll do similar to what Lindsay is describing, where they snap a picture, they put in a placeholder.

--- Quote templates ---

MATT

39:26 And then when it comes back to the office, then they're typing in the separate items. So you don't have any duplication, you're getting rid of that one line item or replacing it with information, all the other align items. So you don't have the duplicate, but that's usually one of the two ways that those things get filled in.

--- Quote templates ends ---

ALEX

39:43 Got it. Okay.

MATT

39:45 So, for Lindsay's question about automation, we can absolutely look into that, you know, there may be a way to bulk.

LAUREN

39:58 But...

MATT

39:59 Import items into a po, but that would be one of those outside the box questions for a team that is much better qualified to answer those kinds of questions.

--- Parts management (purchase orders) ---

LINDSAY

40:10 Yeah. I think my question is more around, you know, because we can work that out on our side. The question for me is more, I don't want that line item on there. I want it to be like a header record for the po with no line item and then the line items be added later, which actually is the same question Alex is asking. I think because you're Alex, you're saying let's say the tech has to put in a line item here to get their po. And then when we throw all the EDI line items in there, is it gonna add it to the line item that exists or is it going to override it? Really, we're basically asking the same question which is, you know, we really need some header information on the purchase order, the vendor, the total, the number of line items and really not the line items. But I don't that's kind of it's an architecture thing. I don't know that's interesting.

LAUREN

41:03 Some of the header information will be visible like the job number, the job type, you know, the location, this purchase orders associated with like that's. Probably gonna be what you consider the header, I think Matt process of what he showed of like box of stuff just so you get the cost just, you know, from like a cost and cost control standpoint is probably the most simplistic way to accomplish, you know, the tech documenting that information and what's nice about this product, partsledger, it's truly ledger. So, however we get that list of parts into the system, so you can eventually have all that listed somewhere. You'll be able to kinda see every single edit that's ever been made and it'll be just sort of a register of all the purchases that you've made a, and, you know, all the edits that have ever been associated with that.

--- Parts management (inventory) ---

LAUREN

42:08 Because you may receive a Bill from a vendor like six months later and you need to go back and allocate for that. But you've long since billed for this job seat. So our ledger based system to do this parts management from the purchasing and the inventory perspective because we haven't even touched that yet for your refrigerant, it'll all be ledger based. Makes it really nice for the accounting team as well.

--- ST app contracts and pricing ---

LINDSAY

42:32 Yeah, I understand what you're saying. It's the, I just need the text to enter a sub total, not line items. So that's kind of what I'm trying to get to like a quantity of total items, how many items are going to be on this po 10 and then it's gonna cost us a 1,000 dollars and then a picture of the order sheet.

--- ST app contracts and pricing ends ---

LINDSAY

42:50 Because if I'm putting things in the line items... and I put that into the ERP, then I can't do my automation that's what I'm trying to get.

MATT

43:00 Yeah, I hear what you're saying. I will look into that. I'll see if that's something we've ever run into before that there's solutions. It's usually how I learn is asking these.

--- Paper process ---

LINDSAY

43:13 And I know this is pretty technical, so, sorry, I'm but I'm thinking, you know, what our plan is, and that's that nobody touches POS ever except the text writing them. So.

ALEX

43:24 But same time, we also don't want to text spending a lot of time in the field, fill in.

--- Paper process ends ---

LINDSAY

43:29 Right.

ALEX

43:29 We want that go away and get a, get their stuff and go back and...

LINDSAY

43:33 Exactly.

MATT

43:35 Yep. And we encourage that as well. We want to reduce the administrative burden on your technician so they can get to that higher value work.

ALEX

43:43 Not...

RYAN

43:44 So, Matt question?

MATT

43:46 Yeah, I have.

--- Parts management (inventory) ---

RYAN

43:47 A question about your inventory. You made the comment that if you're looking up inventory, it would tell you how much was in stock or where it was located. Would that be something we could use for some of the assets that we have like a camera machine, a locator, a cable machine, an alignment tool, where it would tell that technician searching where that tool is located, whether it's at our shop or on another technicians truck?

MATT

44:15 Yeah. So partsledger is not a tool tracker. We have been asked that question before. It's just not designed for that. I know there are other software out there that are exclusively focused on tool tracking, but that's not how partsledger works. So I would recommend a mandate if there was one, but really, it wouldn't be a proper use of it.

--- Parts management (inventory) ends ---

RYAN

44:39 Got it.

MATT

44:40 Are you guys tracking tools in your system?

ALEX

44:44 Yeah, yeah.

RYAN

44:46 We do, yes, where the technician can select them to that work order that they're working on. So the billers know to Bill for it, but.

ALEX

44:56 Know where they're at. So we don't know where the tool is actually located.

--- Type of work ---

ALEX

44:59 But the specialty tool like Ryan is stopping. I'm guessing you guys have another spot like for plumbers to charge out the cable machines, right?

MATT

45:07 With...

LINDSAY

45:08 An assigned cost to it. So like every time we use it on a work order, we charge the customers 100 bucks for using the cable machine.

--- Parts management (inventory) ---

LINDSAY

45:15 So the technician selects that they don't see the price or anything, but they select it, and then it records it as a transaction in our work order.

MATT

45:23 Yeah. Yeah. You can absolutely have line items already stored in service trade for things like that, whether it's a crane or, you know, a certain specialty tool that you need to use a boom truck or whatever it may be.

RYAN

45:36 Got it.

MATT

45:37 It just won't track the actual location of the unit after it's been used or before it's been used.

RYAN

45:43 Okay.

MATT

45:50 Okay. And so I just showed you a quick example where I looked up refrigerant and saw that we've got a quantity of three in the depot and we got 162 in the main warehouse. So, at the very least, even though you guys aren't doing truck stock for all the other parts and pieces, you can do that for refrigerant here.

RYAN

46:05 Well...

ALEX

46:06 That show, so depot one and then the main warehouse, that would be something on our warehouse if people want the guys truck.

MATT

46:14 This is a demo account. So I don't know why they call it depot one, but that could very well be truck one, truck, two, truck three. So they'll be able to see all the different trucks out there.

ALEX

46:23 Can we narrow down just to their truck and the main warehouse?

MATT

46:29 They would see their truck on the list, but I think the search would pull up everything that's another question that we can ask because I know there's some additional layers, some hierarchy you can do in partsledger but I can't speak to it because out of fear of giving you the wrong answer.

ALEX

46:49 Yeah. Okay.

LAUREN

46:52 The thinking behind allowing them to see all the trucks is like if they don't have the refrigerant, they need, maybe their buddy is down the road and they like, hey, man, can I come at this refrigerant from you? And they just either do a transfer or just mark that they pulled up from that vehicle.

--- Parts management (inventory) ends ---

LINDSAY

47:11 Just so be hard for them to scroll through like 230 trucks?

RYAN

47:16 Yeah, I think.

LAUREN

47:18 You can do, but we'll confirm that. Sorry, Alex. What were you saying?

ALEX

47:23 No, I was gonna say that out of 200 some trucks, how do you know which one is the closest one as well to you?

MATT

47:28 Just...

ALEX

47:30 To go down this path. And then next, you know, hey, I need two hours, I cause I was looking for me to thought this guy was next to me now as across town, I went there where there was a supply house next, could have picked up another job at that point.

--- Parts management (inventory) ---

LINDSAY

47:43 The other, the other concern I would have is, you know, maybe Alex has refrigerant in his truck and I pull it from his inventory. And then I don't meet up with Alex to get as refrigerant for some reason. I've had to put a bunch of rules in place in the past where we said, you know, in the system where it was, the tech can only use from their own truck. And then they can give refrigerant and transfer it to another technician, but the technician can't take it from someone else's, truck through something like this. But then does it deplete whatever the inventory is? If you use that 100 pounds off your truck or whatever, it deplete it from the inventory right there during this quarter? Okay?

--- Parts management (purchase orders) ---

MATT

48:20 Yeah.

MATT

48:26 Yeah. So, by creating that purchase order there in partsledger, we now see the job is updated with those two items that we ordered. We've got the rooftop unit and it's got the parts vendor. It's got the po number and same thing with the box of stuff.

MATT

48:48 Okay.

--- Assets ---

MATT

48:48 So that is how they add parts in labor items to the job tracking assets. This is another big one for our customers. So again, the mobile app was designed with simplicity in mind. So even when we pull up the assets, it first starts off showing us the appointment view. So you might have a site with 200 assets on there. Instead of showing the technician, all of those at once, we're just looking at the assets that we're concerned with for this one trip. But if the technician gets pulled aside by a customer and they say, hey, why you're out here? Can you look, take a look at our walk in a cooler here, they're still able to do that as well. And because assets are tracked individually at the location level in service trade technician is going to be able to open this up and they're going to be able to see all the detailed information about the unit, like the specifications, make model, serial number, refrigerant type. If there's any schematics or blueprints spec sheets on that asset, you can have those as attachments that the technician will be able to access there. In the field, they're going to be able to see any past deficiencies or repair opportunities ever found on that piece of equipment. But the big thing here is the service history. So now we are looking at a chronological list of all past jobs that were performed on this one unit at this one location, which means the technician can open any one of these jobs and they can see, you know, who was there, what they did, parts they used. They can see, you know, any pictures that they took, and they can even see whether or not they captured a signature from the customer before they left for the day?

ALEX

50:27 Now that's per piece of equipment, can you do first time as well?

MATT

50:32 Do it per site? Yes, you can.

--- *Type of work* ---

ALEX

50:33 Okay.

MATT

50:34 Yep. And...

ALEX

50:38 Here, they just have PMS on here, but you would have your regular service call, your emergency service ball, all that.

MATT

50:44 All of it. I just when I demo, I just routine the PMS but yes, you'd see service calls, projects, retro, whatever that might be? Yep.

--- *Assets* ---

MATT

50:53 Exactly. Good question. Now, I know you guys have talked a lot about asset tracking and I know this is really important to you guys. Is this what you had in mind in terms of your technicians being able to see that Rich detailed history easily from the field?

RYAN

51:08 Yeah... that.

--- *Deficiencies* ---

MATT

51:13 What's the major benefit for you guys? What's the driving force behind this?

RYAN

51:19 So.

LINDSAY

51:21 Well, a lot of times a technician will go out to a site and maybe it's not the same technician that went out last time and the customers like, hey, it's leaking again. You know... this pipe is leaking again. And so we'd wanna know. Okay, wait a second. He's saying again, we were just out here. Let's look back. Who worked on it? What did they do? What was the issue that they found? A, so then we're providing a better service to the customer and helping them get to a resolution. Maybe the tech tried something that he thought was gonna work. And then it didn't work. So, we now know to try something else that's kind of why the history is always important to know who was out there, what, you know, hey, you switched out the solenoid here, but now we need to do the TX V as it's you know, in line with what the problem is, I was gonna ask on this.

--- Assets ---

LINDSAY

52:08 Is there a way to put like the, it does say preventative maintenance. But if it was a regular service call, the issue that was handled while they were out there. So chiller repair or replaced TV or whatever it is. So that the tech is when you're scrolling through all these work quarters can pick out, okay, you know, this one is the one that I'm looking for because a lot of sites we have huge history.

--- Access to information ---

MATT

52:36 I love that question. I'm not, I think this is kinda the preconfigured consolidated view. So, I think right now the job type is the most detailed you get. But I do like the idea of having a brief description on there. I know that the mobile app is gonna go through some of the same enhancements as the dispatch board.

--- Dispatch ---

MATT

53:03 And to me, it wouldn't make sense for them to allow you to create a custom job name on the dispatch board and not have that reflect on the mobile app. So I'm not promising that, but it seems like it would logically entail that if you can create chill repair or a custom job name on the dispatch board that would be showing up in this list here. But I will certainly ask that question and see if that's already on the road map.

--- Dispatch ends ---

LINDSAY

53:30 Okay. Thanks.

RYAN

53:38 Man. Do.

ALEX

53:38 You guys have any view of our codes or not... reading bar codes?

MATT

53:44 Codes for assets?

ALEX

53:46 Yeah.

MATT

53:47 Yeah, we have customers that do that. Yeah, I remember you guys saying that that's something you were interested in as well?

ALEX

53:52 Yes, absolutely.

MATT

53:54 Yep... absolutely. And Liz, yeah, that's a great answer.

--- *Customer engagement* ---

MATT

54:01 I don't usually get that answer and that's why I asked the question is there's lots of reasons that this is helpful, but I like hearing from you guys what's most important you're talking about better service for the customer. They can make more informed decisions for repairs, maybe faster diagnostics because they have that context that's readily available without having to call back into the office.

--- *Assets* ---

MATT

54:20 But even sometimes in that situation, you describe, it can make you guys look like a well oiled machine. If the customer asks a question instead of the technician being, you know, caught in the field, scratching their head or having to call back into the office and they're on the defense, they can quickly pull up and say, actually mister customer, we were out here working on unit 13.

--- *Assets ends* ---

MATT

54:38 We haven't been on this unit for, you know, eight months and this is what we last did. Now, you guys look like you're you know, you got it together.

LINDSAY

54:45 That's the expectation these days really from customers.

MATT

54:49 Yeah.

RYAN

54:49 And I'm...

ALEX

54:49 Gonna take that a little bit further as well. I'm seeing, so say we are looking at this unit and the customers saying, hey, we're still having the same issue. But from the first visit, we had our technician go out there, send an email request, the quote of changing the contact or changing the bearings. Is there any way here that we can see that?

--- *Quoting* ---

ALEX

55:09 Hey, we sent a quote to the customer hasn't proven yet so that we are on site and we're saying, you know, we're looking at this piece of equipment, the technician in the field be like, well. So, so your account manager sent you this quote. This is where it's waiting for... okay, perfect.

MATT

55:28 Yep. So here we're looking at deficiencies or the repairs that we found on this one unit at this one location, and that's where you can see the status.

ALEX

55:38 Now, this is that one feed. So, when the code is created by the sales team, they're gonna create that within boundaries. I right about that you guys would create that there. And then they'll be sent over to.

--- *Quoting ends* ---

RYAN

55:54 I... think that depends on where they're at with their integration. Ultimately, you can create that quote in service trade currently, correct?

MATT

56:06 That's correct?

ALEX

56:08 Okay. And that's all tied down and it gives the feedback to the technician. So, if he sends in, hey, Ryan, you're my account manager, I need to put the quote together. Next time he's out there, he can actually see that Ryan committed the quote, send it over and we're just waiting for the customer.

MATT

56:22 So, I'm not sure how much quote activity is captured here on the mobile app. I'm gonna add that to the list of questions here. Lauren, have you ever looked into that before?

LAUREN

56:40 I think I heard the question. I was actually gonna ask for clarification. Alex, is your question, if the text can see what has been quoted out for this specific site?

ALEX

56:51 Yes, unit, correct?

LAUREN

56:54 They'll be able to see proposals they themselves have created. If you give them that permission, I believe they'll be able to... intuit, if based on the status of the deficiency, if a quotes been sent, I don't believe by default, they're going to be able to see quotes that someone else has created for this specific site.

--- *Quoting* ---

LAUREN

57:23 Why is that important to the tech? I'm just curious.

ALEX

57:26 I guess so because technicians out on a customer site, we have a quote out there replace a contractor.

--- *Customer engagement* ---

ALEX

57:33 And while they're doing our technicians in front of the customer saying, hey, by the way, your account manager essentially this quote for a contact or replacement, you may go ahead and take care of that in here. Just really helps increase the sales of it.

LAUREN

57:48 Yeah.

ALEX

57:48 And once again, our technicians are so professional, knowing what's going on within each customer site, I think gives us more of a, hey, we're the real deal with professional we want to get things done, right?

--- *Quoting* ---

LAUREN

58:03 Yeah, I...

RYAN

58:05 So, we...

LINDSAY

58:05 Would want them to, well, sorry, we would want them to see all the quotes out there. So if one tech goes and then a different tech goes out after him, we wouldn't want to write up the same thing twice and propose the same thing twice and possibly send the customer conflicting or different amount of quotes even though it's the same repair. We'd wanna make sure, you know, that tech can see the tech that was out here last time quoted this contractor or put that quote request together, whatever we want to call it. I can follow up with a customer on it because I'm still seeing that same issue exists but we would not want to, you know, the tech to quote something that the account manager already quoted or that another tech had already quoted. Not that, that's happened to any of us in the recent past or anything like that, sending the customer separate quotes for the same exact thing at different prices. But if it had, you know, that's a pretty big FO, Paul for us and we don't want to be doing that. So we want everybody to have visibility into what's being quoted including, you know, the account managers. We want them to see what the text I sent out and so that we have one picture of the truth when it comes to quotes for our customer.

LAUREN

59:13 Yep. I would say... mark is a bit unique in that I feel like you give your text a lot more autonomy than most of our customers.

--- Paper process ---

LAUREN

59:24 Do the process that you're describing and the problem that kind of arises from it. Generally, people are solving on the scheduling and dispatching and like they'll be able to see like outstanding proposals and they can be the ones that go in and say, hey, I can see that you have an outstanding quote.

--- Customer engagement ---

LAUREN

59:43 We're coming out next month for a maintenance like let's go ahead and add that to that. So, I think most...

LINDSAY

59:49 Folks that we work with.

LAUREN

59:51 Are using like the admin to do a lot of that research and customer contact. We'll have to, we'll have to do some digging to find out best practices from the field side of things, but that's just sort of like you guys are just unique in that way. I would say.

ALEX

1:00:09 No, we trust our technicians a lot. I will tell you that. Yeah. And I think it brings us value and makes us stand out within our market places just because I think other contractors are like, well, the office will call you as our technicians. We want to provide them as much information as possible to really be the front based working company just because of our customer base and we would have to probably double our sales team for them to start touching every customer as much as our technicians are.

--- Customer engagement ends ---

MATT

1:00:38 Yeah. I like that. And... I think... that suggestion is not that lofty. Again, I'm not in charge of the road map. So I'm not guaranteeing it's on there is being worked on, but it sounds like there's good reasoning behind it. The other kinda piggyback on what Lauren was saying.

--- Deficiencies ---

MATT

1:00:59 Sure, you don't want a technician to necessarily report an efficiency that's already been reported. And somebody's working on a quote. But at the same time, if you're working on 100 units, you know, you may not want your technician to stop at every repair they find, and then look back in the history and trying to find out, you know, start doing the job of the office person who's in charge of the quote pipeline to determine, you know, whether or not a quote has been sent out before the, you know, to make the decision to actually report that. Whereas a lot of our customers want them to just find it, report it, find it, report. I notice the grindstone, anything you find reported back, we'll sift it out in the office to determine if there's still follow-up needed on it?

LINDSAY

1:01:33 Yeah. You guys work with brand, right? In Texas and Castro... in Boston.

--- Deficiencies ends ---

LINDSAY

1:01:40 Those people are or were in our peer group and would probably be doing similar things. So, I'm curious to know how they're using it, but we can certainly ask them. I'll say the Castro people next week so... we can ask them and see what they're doing with that because in our peer group, I do find that we haven't said, I know it sounds maybe crazy for you guys, but in our peer group with our companies that are similar in size to us, a lot of people are kind of doing the same types of processes with that to.

ALEX

1:02:13 We.

LAUREN

1:02:14 Do not work with brand. We did it at one point and it, that chance we're changing our processes.

LINDSAY

1:02:23 Okay.

LAUREN

1:02:25 This main silos, but Patrick been a client for at least five or so years. So they've probably got some solutions for how they manage that.

MATT

1:02:36 To clarify that, we don't think you're crazy for wanting this. So suggestions, it's not like, no, this is how we've always done it. You know, we'll throw those bottomless suggestion box and we're done with it, you know? So.

LINDSAY

1:02:49 That, I don't know how long you've worked at the company, but Lauren, were you at the conference when we played the joke on the Castro people?

LAUREN

1:02:58 I wasn't but I did work at service rate then, and yes, I've seen the video. So.

LINDSAY

1:03:05 Same a, that was a... we tricked somebody tricked case and they're thinking if they made a video impersonating Samuel Jackson that they would, whoever made the best video would get to have dinner with Samuel Jackson. And it was like a joke but only one guy did it from that one guy from, and he made this like really funny video and they showed it to everyone and then they're like jokes on you.

MATT

1:03:34 That's mean, but, hilarious.

LINDSAY

1:03:36 Yeah.

LAUREN

1:03:36 That was the, that was the snakes on a plane here. If you remember that dog will have to share with.

MATT

1:03:44 I love that.

RYAN

1:03:46 It is.

ALEX

1:03:49 All right. So, got.

RYAN

1:03:51 Yeah.

LAUREN

1:03:53 Are we good on time? I know we're at five past the top of the hour.

RYAN

1:03:59 So, I know I have.

ALEX

1:04:01 Another meeting at two. So I probably, so I probably have another 15, 20 minutes. I can definitely Lindsay.

LINDSAY

1:04:10 Yep. I'm good until one.

RYAN

1:04:13 That's...

ALEX

1:04:16 Perfect.

RYAN

1:04:17 I had a feeling we'd run long.

MATT

1:04:19 Yeah, optimistic scheduling for an hour. So we've touched on the purchase order process. And, okay. So, let's, you guys have already seen the deficiency loop, so we can skip that for now. That was something that you guys had had really liked.

--- *Parts management (inventory)* ---

MATT

1:04:39 I think we answered your questions on that. How they, how do you use refrigerant on here? So that's the same concept as adding items on the job. So here you can see the refrigerant use that's what's going to track that, and that can deplete from your truck stock. So that will also impact inventory and you can run reports on refrigerant that has been?

ALEX

1:05:00 Okay. So, like on this refer for 10, you have it at that, seeing that you're gonna put in three pounds or you're expecting to put in three pounds or three chug at that point.

MATT

1:05:11 Yeah. So you guys will agree on the units. So whether you're gonna say the unit is, and you can even specify that in the item description, it can be pounds or ounces, or, you know, whatever.

--- Parts management (inventory) ends ---

MATT

1:05:23 And it says zero out of three because that's what's expected to use. But then the technician would actually indicate that they were used. Does that make sense?

ALEX

1:05:35 Yup. So this is three. Okay. Three. Now, if this is a PM... and I guess this is just a test out like I'm just trying to understand why would you use free if it's a PM? This is just more of a demo process than anything else.

--- Parts management (inventory) ---

MATT

1:05:51 Right. It is absolutely just grabbed a bunch of items and throw them on there just to make it look interesting.

RYAN

1:05:58 We are using.

ALEX

1:05:59 Refrigerant, right? So we use three pounds, and then for EPA, we have to fill out refrigerant.

MATT

1:06:06 How?

ALEX

1:06:06 Go about.

MATT

1:06:09 So there's two different ways that we handle tasking sheets in service trade.

--- Forms ---

MATT

1:06:15 I loosely refer them as the JV version and the varsity version. Okay? So the JV version is fill able PDFS. And if I'm not mistaken, that's similar to how you guys are doing it now. Okay? So that is basically and again, this is a demo account. You can house any of your standard forms in ServiceTrade, we can convert them or you yourselves can convert them into fillable PDF and you can apply smart rules so that depending on the service, the job type, the location that they're clocked in on, it will trigger the correct form for that scenario or you can house them in a library like what you're seeing here where they can just select the form. Okay? And so then that's gonna pull it into Adobe acrobat, which is what's gonna make it readable and fillable. And then...

RYAN

1:07:08 Is there a way?

MATT

1:07:09 Go ahead ran?

RYAN

1:07:10 Is there a way to make that a requirement for them to fill out the form? Or just that it takes them to the form?

--- Forms ends ---

MATT

1:07:17 So, this is a question. We get a lot. We have native tasking. Like I said, the mobile app is going to be receiving some enhancements that are gonna have reminders built in some automations to where like when they go to clock out, it's gonna say, hey, you've indicated this, but you haven't done this yet.

--- Forms ---

MATT

1:07:35 Are you sure this is ready to submit? I don't yet know how strict they're going to be or, you know, if they're blockers that keep them from going onto as a step or, you know, absolutely requiring the form. I don't know yet. The, our R and team has the lock and key on that. So what I'm showing you right now is where, you know, they're out working with refrigerant, they know they need a refrigerant form and this is how they will pull it up today as the mobile app.

RYAN

1:08:04 Got it. Thank you.

ALEX

1:08:05 On the top like.

RYAN

1:08:07 More...

ALEX

1:08:08 Number, is that gonna be pre filled or the guys actually type it out?

MATT

1:08:12 Gonna be pre filled. So that's the other smart rules that you can apply to this to where it can pre fill the asset information. It can pre fill the job number, your company, information, technician information, the customer information that way. When your technician pulls this up, they're just going straight to the business end. They're just checking the boxes, putting in their notes. So it cuts out a lot of their time. Just going through the foundational work of these forms.

ALEX

1:08:37 What about showing the backflow? For instance, we have to put the technician and the backflow license. So, we know Ryan as a technician has licenses, this will bring it over now and that's the user that's pulling down... the actual document.

--- *Assets* ---

MATT

1:08:55 Yes, yeah, you can pull in technician information as well. It's just a matter of matching the metadata.

RYAN

1:09:01 With the...

MATT

1:09:02 Information fields available in service trade.

ALEX

1:09:04 Got it. Okay. So they fill this out and.

MATT

1:09:08 Yup. And then they send it back to service trade. And now... this, whether it's a tasking sheet, refrigerant log now becomes a tied to that job becomes a permanent part of the service history, and the office is going to be able to see this in real time.

ALEX

1:09:27 Okay. Now, let me ask you this. So say year goes by, we do this and customer reaches out and says, hey, I need to know all the refrigerant by piece of equipment that you use on our site. Is there a way to be able to run that report and say, okay, customer X, Y and Z here's your location here's your piece of equipment and here's every time we touched or added refrigerant to it and it breaks it down by piece of equipment as well.

--- Forms ---

MATT

1:09:53 So that's not through the JV version right now. We're bumping up into varsity. So varsity is a product that we call service?

LAUREN

1:10:02 Forms.

MATT

1:10:03 And service forms is they're much more dynamic and they do things like by filling out the form, it can automatically create any deficiencies that you find on the equipment. It can create job items or comments on the job and job items being refrigerant activity, and any changes to the assets that you make while filling out the form, it'll actually change and edit the assets in your service trade database. So there's a lot of cool automation. It also uses conditional logic. So, depending on how you answer the questions, it'll open up other questions. So if you report that, you know, the refrigerant is below a certain threshold, it automatically implies that there's a deficiency. So it'll pull up other questions asking, you know, requiring that you take a picture or, you know, meter reading or whatever it might be. There's a lot more robust. But to answer your question, the other thing that service trade does is it allows you to aggregate the data captured in that form to other databases or recepticles. One of those being, you can aggregate that data to say an excel spreadsheet that captures all of that refrigerant across the assets, customer location, the models, all that stuff.

--- Forms ends ---

MATT

1:11:15 So that at the end of the year, you guys can filter this out for a particular customer and provide them with a log of all that refrigerant activity.

MATT

1:11:35 Is that what you had in mine, Alex?

ALEX

1:11:39 Yes, maybe don't know because we really don't have a good system now. I know it's a headache and half right now for us because hey, the guys forget to fill out the EPA paperwork. So right now, we're actually looking at the work description and seeing at any point in time, it says, hey, I added this or added refrigerant added pounds for trying to break that out, take that out and filter it manuals, or actually figure out when it's actually adding refrigerant on this. I think, you know, we just had this last year and flux customers saying, hey, I need to know at any point in time you added refrigerant to our equipment and be able to give them a nice report would be awesome.

MATT

1:12:20 So, this is an excel doc. This is just one that we've thrown together for demo purposes.

--- Assets ---

MATT

1:12:29 This essentially is doing all the stuff that you're asking. So it's got the date, it's got the amount of refrigerant, it's got the type of refrigerant, again, the model, the make model serial... converting an excel spreadsheet into a nice.

ALEX

1:12:47 Or we can do that. Yeah.

MATT

1:12:50 I was gonna say that's should be a simple step is the data capturing, which is usually the tough part as you're describing.

--- Forms ---

MATT

1:12:56 So, mind you all of this is happening in the background as a technician completes this refrigerant log through service forms. So what that would look like is they clock into the job, it would dispatch them a refrigerant form where they can then just go through each unit stuff that they added. They complete the form. Now, it produces a customer facing report for that one service call. But then it also aggregates the data into a database like this that you can then filter and turn into a report for the customer at year end. But then it does all those other automated actions like adding the refrigerant used to the actual job in service rate, it's doing all of that in one fell swoop as your technician is just simply completing that refrigerant.

--- Forms ends ---

ALEX

1:13:38 Got it.

MATT

1:13:39 Okay. And service forms is really robust. That's why I usually warrants its own demo. For some companies. It's overkill, it's more sophisticated than what they need. But if you guys are actually looking at that level of detailed refrigerant tracking, then that would be the solution that we have for you.

--- *Assets* ---

ALEX

1:13:56 Yeah, I think we would definitely... all right.

MATT

1:14:02 So, that is refrigerant that is tasking sheets. Do you have much time use? So reporting on how much time was used on a particular unit... you can do that. I don't want to bore you with the details, but.

LAUREN

1:14:24 You...

MATT

1:14:25 Basically be assigning individual services to individual pieces of equipment in order to get that level of granularity otherwise, you know, most of our customers are assigning like, hey, here's a quarterly PM on 20 units, in which case any job items applied to that one service are gonna kinda be blended or like meat loaf together for all of those units.

--- *Assets ends* ---

MATT

1:14:46 But if you do service by service, you know, one to one ratio with your assets, then you can achieve that level of granularity. I don't know. Did that make sense? Yeah. Okay. And then the auto prompts, we talked a little bit about that, how the mobile app is going through a facelift, there's, native task in going in there with reminders and prompts. I don't know how far that's gone to actually restricting or, you know, kinda nailing the technician down to do it before they complete the job. And then I think the last thing that we wanted to cover was the time entry. So, Lauren, did you pull up a time?

--- *Assets* ---

LAUREN

1:15:30 Card service time card? I did.

RYAN

1:15:34 It's...

MATT

1:15:34 Wonderful.

LAUREN

1:15:36 I'll pull it up and you can talk through it. Let me see. I've since opened some tabs. So find.

MATT

1:15:43 Clean them up. I know you're online shopping right now.

ALEX

1:15:48 Why we're doing that? What about safety notes? Like a technician gets order dispatch to them, and there is a safety note to notify hey, there's a skylight on the roof without any barricade around it to make sure we don't fall through. It. Is there anything on the app itself that can provide that kind of detail?

MATT

1:16:08 Yeah. So the comment section goes both ways for the technicians rule of thumb is technicians wanna be reading job comments as soon as they open up a job because it's going to have important information like maybe the gate code or parking access, roof access and stuff like that. But that's also where you would put in any job safety notes as well?

--- Dispatch ---

RYAN

1:16:25 And what?

ALEX

1:16:26 About notification. So I'm guessing this is an apple.

MATT

1:16:30 When I...

ALEX

1:16:30 Work orders dispatched to that technician, is there any notification saying, hey, you have one new work order on to you?

MATT

1:16:37 Yeah. So for any changes made that day, usually it's you'll see it on the dispatch board, the technician can automatically be notified any time a job has been added or removed from their schedule right now that's through email.

--- Tech time tracking ---

MATT

1:16:55 We get a lot of questions about text messages. If that's your preference, then there are easy ways to convert emails to SMS.

MATT

1:17:08 So, this is the service time card. And so here, you can see for Lauren time card. It's displaying all of the jobs for April tenth through the April sixteenth. And you, you'll notice that each of the jobs, you can even click on the hyperlink, if say the person is reviewing all this time and they wanna know, hey, this doesn't look right on job. They can open the work order right up from the time card and investigate it further.

ALEX

1:17:40 Just real quick. We jump in. So Lauren, this is her time sheet. So... this is different customers and she's going in. So she going in, you add the actual time or is that picking it up from the actual from the end?

MATT

1:17:54 It's pulling it from service rate.

ALEX

1:17:56 Okay. Okay. Perfect.

--- Tech On-site ---

MATT

1:17:58 To that point, at the top, you'll see we have labor items and you also have clock events, so you can Bill for either of those.

MATT

1:18:11 So, now, it's going to show the actual clock events as the technician is clocking in and out of in route job crap onsite.

--- Tech time tracking ---

ALEX

1:18:18 Got it. Okay.

MATT

1:18:21 The other thing that you can do is down below, you'll see sick time, pto training. So you guys can have these ad hock, miscellaneous categories that you can use to capture things that aren't directly related to jobs. And as they were showing the new dispatch board, you remember when they were showing like when you schedule a technician as being out, they were saying that information of scheduling them being out, will actually pull into the time card as well.

ALEX

1:18:53 Like on this one, if a guy goes in here and says I get eight hours of pto today, even though he doesn't have pto, you can still put it in eight hours.

MATT

1:19:04 He can put in the eight hours and he can submit it for approval, but the manager is gonna know whether or not he had pto available. And then this is where they can kick it back to him and say, hey, I know you put in eight hours of pto. It doesn't look like you have any, you know, who did you get this approved by? Or are you sure this is not sick time or whatever, kick it back to him. And then he can make any changes.

LINDSAY

1:19:31 There's no way to restrict it and take pto off and, you know... take it off so they can't enter anything that's unapplied time?

ALEX

1:19:39 You actually.

LAUREN

1:19:40 Can you actually can define what these fields say? So you may out to just take that off completely. It's kind of up to you. It's meant to sorta because everybody does time tracking differently especially because there's different requirements everywhere. It's meant to be sort of flex.

RYAN

1:19:59 So...

LAUREN

1:20:00 You can kinda decide if there's something that's not job related that you'd like to track. You, can, they can fill it in at the bottom?

ALEX

1:20:08 Do you guys have any kind of approval process? So right now, currently, if our guys need, so training school training, right? Or job site training is a good example, they will send in a smart sheet form in the morning to get approval for the eight hours for that day to get go on training or unapplied time. Is there something on here that they, we can go through like an approval process prior to it then saying, hey, by the way... I was with Ryan on this job site and I need 16 hours of training time because I was just learning from him or whatever that is at that point.

LAUREN

1:20:42 Currently, no... you can do it after the fact. If I submit this, then the office, this is a little bit misleading visually just because I'm showing you the tech view, but then also the office view, I'd be able to come in here and review the time cards. So they really, the text would see submit time cards. The office would see review time cards and then they'd be able to view and respond. If there's any question of like, okay, I've reviewed this. I can request a change out a comment and then subsequently export it by itself or with everybody else's time. So there is.

RYAN

1:21:25 And...

--- Tech time tracking ends ---

ALEX

1:21:26 Every technicians time will have to get approved or can we do it?

LAUREN

1:21:32 I, we'd have to look into that. I'm not quite sure the answer.

MATT

1:21:37 Question was, are you, can you approve them in bulk?

ALEX

1:21:42 I think is that like right now for saint Louis, I have 124 technicians. I don't have the time to sit on a Monday and go through 124 time sheets to be able to prove it fast, enough to be able to send them a check every Friday. So our guys get paid every single Friday. We process payroll on Monday through Wednesday, checks on Wednesday sent out and they're in their accounts on Friday every week.

--- Tech time tracking ---

ALEX

1:22:05 So for me to approve 124 guys and see if someone's trying to be sneaking, submit eight hours of pto, eight hours of training, makes it really difficult at least from my standpoint just thinking about it right now. How would I go about it? That's my biggest?

MATT

1:22:23 How do you guys currently review and in vet your time cards? But you're not doing it one by one?

ALEX

1:22:30 So, are all the time that has been built to the work order? Obviously, it doesn't really have to get reviewed, you know? So the only thing I review is anything that is on applied, but the way it gets reviewed currently is it's going through the smart sheet request that comes to myself or our dispatch supervisor that she approves it. Then we add that in applied labor ticket to their board within pens within our software and they just submit the five hours or six hours they requested through what process through. So then what I do is every week I review and see if anyone has double time or crazy amount of overtime. I kinda glance over those guys. But if a guy has 40 hours and it's all being charged to work order letter. I like that's there's nothing I can do from my standpoint to make a difference there.

MATT

1:23:20 So...

LINDSAY

1:23:21 We don't we don't give them access to enter an on applied time until it's been approved, is basically what Alex is saying through a workflow that we, any of us can see on the fly from our, you know, from our email or mobile phone or whatever. So we don't let them enter the time at all on the front end for unapplied.

RYAN

1:23:43 Sounds like it.

ALEX

1:23:44 Guys that will try to pull that off and squeeze in eight hours.

LINDSAY

1:23:50 The other thing is that it's like from a union standpoint, where a union contractor, if they submit a time sheet and we alter it, they can go and complain to the union that we're altering their time and they didn't agree to that. And so, there is some issues with our collective bargaining agreement and things like that with the union. If we're you know, let's say they submit it and Alex is like, you didn't have eight hours of pto delete, you know, that could become a problem for us.

ALEX

1:24:16 Yes, great. I'm just interested kind of seeing what companies are doing that have, you know, 260 technicians. I just don't see their ops manager or somebody like that sitting and just approving every single time I could be.

LAUREN

1:24:35 They don't they have a payroll person that does that. They generate referring admin at it because.

ALEX

1:24:44 An admin on how admin doing?

MATT

1:24:49 How would admin know what?

ALEX

1:24:51 How would the admin know? Like, yeah, this guy gets eight hours or now, this guy should be on training or should be on training just from that knowledge base. How would that admin know? Yes, this guy was definitely on training on Monday for eight hours.

LINDSAY

1:25:07 I think we had to set up some roles or something like that. Let me ask kind of a little bit of a different question. But related to this which is, you know, let's say we found a way we took those off and then only the office could enter it and the office could enter the training time or the pto or whatever it was. Would they still be able to see it here? So, let's say they've submitted 32 hours of work order time, and then eight hours of pto. Could they see the time here without being able to enter it?

LAUREN

1:25:42 The technicians, you mean?

LINDSAY

1:25:43 Yeah, sorry.

LAUREN

1:25:46 We'll have to check with our time card team.

--- Tech time tracking ends ---

LAUREN

1:25:49 This is a, this is a product that is constantly undergoing improvements. I can't remember we may have actually designed this time card for specifically and I think they use it. So they may have some good insights on how they're doing it for their text. Now, they're not managing like 300 techs out here. They're closer to like 30 or 40 on the service side of thing, but they may have some good insights. We'll also do some digging. Neither Matt nor I are super experts at the time card and I know because it is a product that is in flex a lot of times... there, there are probably things that it can do that we don't know about. So what we may wanna do is schedule some time with James who you met on the last call and his team to get further context.

LINDSAY

1:26:48 I think, you know, from my perspective, we're asking a lot of like really biggest thing that we're trying to I'm trying to understand is what's the flexibility?

--- Tech time tracking ---

LINDSAY

1:26:59 Like could I as an administrator go into settings and not let text enter pto, but still display it to them or is that like a development item where like you guys would have to release something? So I wanna know as, you know, I would be an administrator of the system, how much can I configure and how much is required for me to like submit a ticket to you guys?

--- Tech time tracking ends ---

LINDSAY

1:27:19 And then you put it on your road map and I feel like you guys have a lot of great features and I still don't know if I feel after watching everything, super have a good understanding of what can like the, what can the business user, the super user, the owner of the system? Like somebody like me or it configure, and what is development for you guys. But that's still, you know, just kind of a question in my mind generally.

MATT

1:27:50 Yeah.

LINDSAY

1:27:50 No, not that you have the answer right now but just, you know, something, we always want to have a solution that's pretty configurable and something where I would have flexibility as the business to make some changes.

MATT

1:28:04 Sure. Yeah. And, you know, to partially answer that question, a lot of the stuff that we have shown you is fixed and would require, you know, development some architectural changes on our end, which is a curse and a blessing. But especially for our larger customers that have unique needs like you guys that's really where James ends up coming into play. We often say customization through integration. So, he's taken on some special projects for different things like tag statuses, and he's done some cool stuff that I didn't even know that we could do, but it's usually for large customers that are asking for these unique requests. So again, because Lauren and I can't necessarily answer it on this call or show it to you. That does not mean that it's outside the scope of the possibility. And it's just something that we're often doing for our customers is helping them find a solution. So we're invested in it with you guys.

ALEX

1:28:57 Of course, man, how many you guys have that have as many technicians on the service?

MATT

1:29:04 We do... so, we, because we started in the firing life safety space, we have a lot more large firing life safety service.

LAUREN

1:29:15 Departments.

MATT

1:29:15 That are, you know, some of them are double your size and it is different than mechanical, but it's way more similar than it is different on the mechanical side. I think Lauren, our larger customers around 100 over 100 techs on the service side.

LAUREN

1:29:35 I'd have to look at our list, our client list. I think our largest mechanical, probably the, yeah, between like 102 100 technicians. So, so in sorta range.

MATT

1:29:46 Yeah.

LAUREN

1:29:46 I have to jump everyone and it was great seeing you. I've got to jump for my next call. We'll catch up san.

--- *Dispatch* ---

LINDSAY

1:29:53 Yeah, thank you.

ALEX

1:29:54 Thank you. Have a good.

MATT

1:29:56 I know you guys got to jump as well.

RYAN

1:29:57 Yeah.

MATT

1:29:58 Of a meeting real quick before we go. Lindsay, you said that you're going to see Castro? Is that, are you guys going to do like a sit in like a day in the life of, I remember Chris talking about doing something like that.

--- *Dispatch ends* ---

LINDSAY

1:30:12 No, I'm not very mobile, but they're coming here for our critique. We're getting critique out in Colorado. So we do in our peer group, we do, I don't know if you call it like an inspection, but the peer group companies come in and talk with you about how your business is going and they make recommendations on how you can improve. And we're the lucky victims here at the end of the it's may fourth and fifth. And so a couple of the Castro players will be out here. And I'm assuming I'll see the service leader, Joe ignores and I'll be sure to talk to him a little bit about it because I'll be able to spend some time with him for a couple of days.

MATT

1:30:51 Yeah, I would love that. Definitely hang on to these questions, ask them how they're handling it. I think that would be really interesting. And in the meantime, I've got a good list here going and I'm gonna submit to my team to see what we can get for answers on these things.

--- *Purchase decision* ---

LINDSAY

1:31:04 Awesome. Thank you.

MATT

1:31:06 Was this helpful guys?

RYAN

1:31:08 Absolutely.

LINDSAY

1:31:09 Yeah, I think so. We put you through the ringer a little bit, but, you know, it's really important to us that whatever solution we choose really, you know, it's such a big group. It's so hard to release a solution. It really needs to be the right one for us. So we appreciate you sticking with us and scheduling these meetings.

--- Purchase decision ends ---

MATT

1:31:26 That's why I'm here. That's why I'm here and I'm committed as a resource. So I'm not getting tired of your questions. I don't find these annoying at all. Like I'll do what I gotta do to make you guys feel better about it. So you can make a form decision.

--- Purchase decision ---

MATT

1:31:38 So I'll follow up on those questions there. The only other action item that I know of is setting up references for Chris or you guys to go out and do an onsite? Is there anything else based on today's meeting that you guys can think of that we should set up for a next step?

RYAN

1:31:58 At this point, I'm good.

ALEX

1:32:00 Yeah, I would agree. I think we're good. I think the next thing is really just diving into somebody that's in the same line of business we are and spending maybe a day or two with them and actually going spending time at their site and just seeing how everything works from the field to the office and how everything processed through. I think that's going to be a bigger thing for us more.

--- Purchase decision ends ---

MATT

1:32:19 Yeah. Okay. I like it. Let me get.

LAUREN

1:32:22 Work on.

MATT

1:32:23 That. I don't know what the turnaround would be, but I'm gonna pull in our co to help with that and have him make some good recommendations for you guys as well. So... any other questions you guys have, pass them along?

ALEX

1:32:37 We'll do.

RYAN

1:32:38 Thank you.

ALEX

1:32:40 Thank you.

MATT

1:32:41 Thank you guys. Keep having a.

ALEX

1:32:42 Great. Bye bye.

The End