Meeting with Juanita Guzman

Juanita Guzman with K & R Mechanical Services
Recorded on 12/7/22 via Zoom, 51 min.

Participants

SERVICETRADE

Juanita Guzman
Account Manager

K & R MECHANICAL SERVICES

James Mugavero
Service Manager

Topics

Transcript

--- Call Setup ---

JUANITA

0:00 So on Zoom, you should be able to hit the mute button on the left bottom corner... assuming you have a microphone on your computer that you're using... if not, let me send you via the chat, the dial in number that you can call. One second. I usually there you are.

JAMES

0:29 For some reason, I was saying I can on mute, the host won't allow me to mute.

JUANITA

0:34 That is so weird.

JAMES

0:35 Yeah, I don't know what's going on and see what you do video... to work. It's working...

JUANITA

0:40 Okay. There you?

JAMES

0:41 Are, hey?

JUANITA

0:42 Awesome.

JAMES

0:43 Alright. Let me grab this page.

JUANITA

0:45 You're good.

JAMES

0:49 Course, everyone wants to call on wants.

JAMES

1:00 Hey, Brian, I'm on a Zoom. What's up? Yeah... perfect. Okay, cool. Sure. Okay. I'll call you back here in a minute. Thanks, Brian. Alright. Let's go.

JUANITA

1:18 Awesome. Cool. So, I was really excited to see that you put some time on my calendar today because I'll be out the next few days.

--- Call Setup ends ---

JUANITA

1:25 So I'm glad we're having this conversation now... specially with the rates going up 2023 which is actually what a lot of our customers have been doing recently. I actually right before this call, I was, you know, meeting with a customer because they kind of were also on the fence of enterprise, but then, you know, what the price increase. It just makes sense to do it now if you're considering it anyway. So let's see. I'm trying to put some numbers together so we can review the details a little bit better. But while I do this, James, are there any specific questions that you had?

JAMES

2:08 I guess. So the one sitting on, we're okay with that. We want to move forward with it, right? So let's look at, you know, lock isn't now send whatever paperwork you got. I'll get it signed. But that's... definitely something we want to do if we can look at some of the reporting options that will gain by switching over to the enterprise. Yeah, like that right there?

JUANITA

2:37 But I'm like... yeah, that's exactly what's included.

JUANITA

2:53 Office tech stuff they make us do.

JAMES

2:56 Yeah, no.

JUANITA

2:56 It's passwords.

JAMES

3:00 But the actual reporting like this quick site, see revenue that they'll show me what's outstanding, I guess really to see what we're doing, per customer, that kind of stuff.

JUANITA

3:15 Yeah. Let's see. Let me pull your data in here.

JAMES

3:19 You can't really... nice.

JUANITA

3:23 Okay. So yeah, this is a perfect example. So let me kinda backtrack a little bit. So enterprise, it'd B, obviously the 159 rate through the end of the year. So we have the business analytics reporting. So this is kind of like a two parter. So with the enterprise upgrade, you would get a couple of dashboards that are included with enterprise. This being one of them. So this just to quickly walk you through it, we obviously have our revenue by job type, and we can actually also program this to kind have if we click into a certain field, it'll take us to somewhere within service trade to access that information. We've got revenue by months here are open quotes.

JAMES

4:18 Hi... this is good. This is the kind of data I need so that, you know, like seeing Antonio, I mean, that's I'm guessing that two point 2,000,000 dollars is what he's quoted. You scroll down to the quote pipeline.

JUANITA

4:36 Let's see who are we looking?

JAMES

4:37 The first line?

JUANITA

4:41 Yeah. So Antonio, so here's what he submitted right? Where he sent to the customer would still out there draft and then actually accepted with the dollar amount associated. Wow. Yeah, it's pretty cool stuff.

JAMES

4:57 No, right.

JUANITA

4:58 Yeah, exactly. And with the efficiencies by last reporter here, we can see Alber, holy, moly, he is our top deficiency creator Albert needs to raise, right? I don't know something.

JAMES

5:11 Yeah. And he just got one.

JUANITA

5:14 Good for him.

JAMES

5:15 No, it's killing it. And that's you know, perfectly example, right? He is absolutely doing what now, why is Jonathan Castro still on there? He's no longer part of the team and he's been removed. Is it just because he was this year part of the team?

JUANITA

5:28 Yeah, that's because I'm filtering by the last year.

JAMES

5:31 Yeah, that's no problem. You don't have to change anything. I was just curious.

JUANITA

5:34 Yeah, for sure. No, that's a great question though. But also these can be, you know, manipulated to kind of remove like in your example, deactivated users. And then down here, we have an overview of revenue distribution and density by customer. So essentially what this is showing is the lighter, the box, the less... okay this is by customer. This is by job type. Okay? So by customer, the lighter, the box, the less amount of times we have to go out there at that location to get this dollar amount of revenue.

JAMES

6:18 But is there any way heavy hitter? So we're always.

JUANITA

6:20 Yeah. So it's like we kind of have to start thinking, okay, who, what customers do we need to start prioritizing more, right? Who is actually draining our resources the most? Gotcha. And then by job type similar here, right? So service calls that just requires more visits for more service calls to get this amount of money.

JAMES

6:47 Okay. These are pretty good numbers. I mean, you know this, I opening.

JUANITA

6:52 Yep. We have a seeing here at service trade that we use all the time, feelings, fool and data rules, right? Because... we can think we're doing a good job, but the data doesn't light, right?

JAMES

7:06 What I'm looking for is where we're not doing a good job, right? That's because, you know, I wanna course announcement. We're doing very well on a certain segment or certain areas like, hey, give that accreditation to who needs it. But also look what we're not doing so good. So let's do, let's put more resources into that and figure out why and how we can fix it. Where's our bottleneck?

JUANITA

7:27 Exactly. Yeah, because at a high level, you could be doing incredible, I mean which you are, but it all comes down to Kate, whereas the bottleneck, right? How can we further improve that? So this is one example of a visual that comes with the enterprise subscription as well as one other. I'm gonna go see if I can find it. But essentially, and why I say it's like a two parter because with enterprise you'll get, I believe I'll have to confirm just this one and another dashboard. But as far as like any customization or additional dashboards that you want to see that would either need to be done in house, some of our customers do have like a designated person to do these types of things. But then on the other hand, what's that?

JAMES

8:18 Said you're looking at them?

JUANITA

8:20 Okay. I was gonna say, but then on the other hand, when customers do not, we typically recommend a technical account manager subscription. So the easiest way to describe a technical account manager, it's kind of like an extension to myself. But they specifically focused on data and service trade. So think of it as like if you were to get one of these subscriptions, think of it like you have access to somebody from service trade that they work for you, right? So they're like you're not paying them an annual salary but you're paying the annual subscription to have access to those things. Gotcha. So let me show you what I would recommend would be the consultant at four hours per month. So these are some of the things that they do. So for example, best practice review both data management. If there's any like data clean up that needs to happen. Any bulk uploads that need to happen. They can take care of it as opposed to you having to go through our professional services team which is an hourly rate or do it yourself. Let's see we have service portal setup and maintenance. I believe you already have that set up, yup, zap, your integration, custom integrations, notification, engine, setup and maintenance. I'll give you an example. Let's say if we're dealing with our projects, the Tam team can trigger custom notifications to like if a project gets to a certain point, it will automatically trigger a notification to somebody that needs to step in and, you know, follow it out throughout the cycle. And then, yeah, the biggest one is the quick site dashboard creation. They can basically create additional visuals and dashboards that's not already included in the enterprise subscription.

JAMES

10:30 Asking us, Juanita. I mean, I like the idea of having that, but, you know, for me to justify what I think's gonna happen is, so we're going to move to enterprise, right? So they have a dashboard once our CFO kind of get in there, start playing with it. I know he's gonna ask me a ton of questions, right? Like what can we look at this moment then I can go, hey, listen, let's get a technical adviser. Yeah. So probably February around that time is when I'll probably look at it and that's it.

JUANITA

10:57 Okay. Yeah, that's not a problem. I was also gonna say if you kinda wanna do like a trial period, I can vouch, I'm like 99 percent sure I can get it approved, but I can vouch for a three month, okay, trial with a technical account manager. So essentially, with the upgrade, we'll give you three months access to it.

JAMES

11:19 Yeah, it would be huge. Yeah, let me know, right?

JUANITA

11:22 And then that would pretty much fall in line with, you know, run March.

JAMES

11:26 Yeah.

JUANITA

11:26 April, and then at that point, you can decide if you want to add it. But for the time being, I can get you access to three months with the Tam, so you can get a feel for what that would look like. Perfect. Cool. So... in that case, yeah, it would just be like the 3,500 dollar difference that I sent you via email.

JAMES

11:49 And that's an annual 3,500. Is that what we're looking at?

JUANITA

11:55 Yeah.

JAMES

11:56 No.

JUANITA

11:56 Word... I sent you just the ballpark, I don't know.

JAMES

12:02 Email, I don't know how I completely raised it from all existence, but I cannot, I'm asking here.

JUANITA

12:09 James, did you get a new email? Well?

JAMES

12:13 I have two, right? So we have that K & R Mechanical SV CS, dotcom one, we still have that. No, we shrunk our email them about another domain so that we can have an alias email, which is KR dash medic, dotcom, but it's still the same first, you know, first initial last name at.

JUANITA

12:33 Got it. Okay. Yeah. So I just wanted... then the long one. Yeah. Yeah, definitely. Okay. So you were here.

JUANITA

12:48 Let's see the users. So I had just looked at this. I quoted you at 11. Yep. But I'm seeing a little bit more than that. It's look.

JAMES

12:59 Yeah. So I can understand too. So, you know, we have plumbing now coming on board. So, so when we say users we're talking about technicians.

JUANITA

13:12 Correct. Just.

JAMES

13:14 Do you want to your store? Just our technicians? So we can review those together?

JUANITA

13:17 Yeah. Let's do that.

JUANITA

13:31 And then we also have helpers. I don't know if that would be.

JAMES

13:34 Hi, I'm past to start utilizing that I have not yet.

JUANITA

13:38 Okay.

JAMES

13:39 Alright. So, Carlos, he's inactive, right? So that doesn't count.

JUANITA

13:44 Correct. It's. Just the green check marks that it's...

JAMES

13:47 Yeah, Josh, yes, Jason, yeah me on kind of like a test one.

JUANITA

13:53 In count you and the numbers I should, but I'm not going to.

JAMES

13:58 Hi, this is a new one. I just added... Albert yet. Yeah, core is gone, it's gone coolio. Yes, frame. Yeah, you lean, and we, Paul, he actually, he's gone today, Paul, Mitchell knowledge... but we're gonna, he's gonna be quickly replaced with a, with another technician. So, should I replace? I mean, that's a good question. Yeah, I heard somebody to take his role. So they use that as a replacement or says avenue?

JUANITA

14:37 Recommend you can do either for example.

JAMES

14:42 The benefit of doing it as a replacement one, that question to ask is this technician replacing somebody?

JUANITA

14:48 You know what? I'm actually going to recommend you add you deactivate. Follow-up...

JAMES

14:53 Okay. And...

JUANITA

14:54 Then just add an additional user is whenever you deactivate Paul?

JAMES

14:59 You want me to do it or do you want to do it? I don't mind.

JUANITA

15:01 No, you can do it. I'll let you do it. You can then assign like anything that Paul was previously assigned to, you can enter a name on who you should forward, kind of like that information too.

JAMES

15:14 Okay. Yeah.

JUANITA

15:17 You do that? I don't wanna.

JAMES

15:19 Yeah... here.

JAMES

15:28 Active deactivate.

JAMES

15:42 That's doing it. So, alright, so, he's going to be deactivated. And then that will give... let's see if I can learn that account... the budgeting form. Like I said, do you know when that performance tab is going to go live early adopters?

JUANITA

16:04 I do not know the answer to that. No.

--- Pricing ---

JAMES

16:06 No, they said this month?

JUANITA

16:10 Let me make note of the.

JAMES

16:12 Definitely. So I'll make a paid user type.

JUANITA

16:17 Hello?

JAMES

16:20 So, I, so 14, right? But it's still Sean... status, active search. So it'll be 13 total users at this.

JUANITA

16:38 Okay. 13.

JUANITA

16:58 Okay. So 13 at 159 that's gonna be 24 eight for recurring annually?

JAMES

17:08 Yeah, that's fine.

JUANITA

17:09 And that's gonna include time card. And then I would also turn on the return recurring invoicing.

JAMES

17:17 That's a big one too for our PMS? Yeah. So this is kind have a Bill of goods sold when we did the demo?

JUANITA

17:25 No, which one? The...

JAMES

17:28 Yeah, the recurring because that was our biggest issue that we had internally was making sure that our contracts get invoice appropriately and, you know, really pushed service trade home was the recurring billing. So like on the contract invoicing right now, that being said, it's fine. We're getting there now. So I'm not too worried.

JUANITA

17:52 Got it. Okay. Yeah.

JAMES

17:56 Do some training on that.

JUANITA

17:58 Okay. Yeah. I just click this button here.

JAMES

18:03 Okay.

JUANITA

18:05 And give you access to that.

JAMES

18:08 Now, for the quick site, once everything's finalized, how long is it gonna take to get switched over to?

JUANITA

18:16 It's relatively quick. So, for... let me ask, I'm gonna go with at least a week.

JAMES

18:25 Okay.

JUANITA

18:27 So, for example, do you wanna shoot for like a start date of 1,215 January first?

JAMES

18:34 As soon as possible.

JUANITA

18:36 Okay. That would be 1,215.

JAMES

18:38 Yeah, because I'll be out... from the 20 third until January?

JUANITA

18:44 Nice me too, so.

JAMES

18:47 So, I'd like to at least have some of this data to play with before role. It's perfect towards the end of the year, right? Because like that four point two six, I'd love to speak about this. You know what I mean? And kind of start breaking it down because of my service meetings. You know, technicians don't even know everything, but that is good. The VM will show them some insight on what they're doing on the field. And really, you know, give them some actual hard metrics on you guys are doing this, you know, quoting it, but this is what this is what do you have done?

JUANITA

19:22 Yeah. Okay. Cool. Yeah, we can get started as early as 1,215. Okay. So how that works is I can honestly probably get that agreement out to you by today. Would that work? Yeah?

JAMES

19:38 Yeah, it's about over.

JUANITA

19:40 Okay. That way we can get you started 1,215 on those visuals. Okay. So I just need to get a credit amount from accounting. Like if there was an invoice or any invoice that you've already paid up to a certain point, I just need to grab that amount so I can apply it to the new agreement. Another question for you. Do you prefer to keep the service forms subscription separate? Or would you, since we're doing this, do you want me to put it altogether in one?

JAMES

20:12 So, it'd B1 billing annually versus, too?

JUANITA

20:15 Correct? Or whatever frequency you're currently?

JAMES

20:18 I have what you already paid for the service forms.

JUANITA

20:23 Yep. So same thing would happen essentially like what you've paid up to 1,215. I would take us a credit and apply it onto the new agreement.

--- Pricing ends ---

JUANITA

20:31 It's totally up to you if you just want to have two separate subscriptions or just take this opportunity to lump everything into one completely up to you.

JAMES

20:41 Plan on separate. Now, ask Joe if he wants to see it all his one. And if he does, I'll just shoot, you know?

JUANITA

20:48 Yeah, that's no problem. Okay? So I will plan on to, yeah, for now. I can plan to keep it to separate. Cool. So, yeah, I've got everything I need James. I can get started on this. A sap. I will get back to you on the date for the project management stuff if I can. If I can grab one... let's see anything else?

JAMES

21:17 If I could get a copy of that, Zoom that webinar that I watched be cool too, because I wanna make, I want to share that with a few in office.

JUANITA

21:28 Okay. Yeah. I'll see where we are with that. I checked this morning and our marketing team is still working on snipping it and making that final edits. So it's gonna come out soon but I'll see kind of where they are with that. Can I ask you about BuildOps just because I'm curious about it? Yeah. Okay. I'm just curious to know where you were you a part of kind of that evaluation?

JAMES

21:56 No. Again, it's one of those things. Once I put my foot in it, then I start getting drug into, right? So that's kind of all in Construction right now. But like I told you with the new capabilities that service trade is going to have with the project management side, it's probably a good chance that we can kind of redirect at a BuildOps back into service trade.

JUANITA

22:19 Okay.

JAMES

22:20 Now, I'm supposing, let me know that you said that reminds me. They sent me when I say they might Construction group sent me... a log in for BuildOps so I could probably get in and show you around whenever I get it set up if you're curious.

JUANITA

22:38 The, I am very curious to see like their service.

JAMES

22:45 Which I don't know. I don't know how it works over there. I gotta talk to wait a little bit more, which is our Construction VP on if it's just one sweet that has servicing Construction, or is it like, okay, well, if you wanna be services to different suite, right?

JUANITA

22:59 Yeah.

JAMES

23:00 Which I would imagine it probably is. But I just, I don't know cost wise. I think he's probably right on the same line of service trade, but they do the licensing a little different... and I know he doesn't have a lot of guys. I think he just has superintendents and field supervisors that have accounts, but it wouldn't be good. You know, it can get costly for us, right? So all Construction, a lot of times you have a agent that you use for hiring, you know, group of female specialist. So I got a big project going in pasadena. I might hire 20 guys that are just sheet metal or from a temp agency. And right now all their labor is logged on paper, you know, what the helper for a, you know, role and you just get cumbersome, right? There might be a lot of movement there. We might go from 21 month to 10, the next month to 30 to 10 30 to the, you know what I mean? So I don't know if there's a good way to attack there.

JUANITA

24:05 It sounds like they'd be just temporary.

JAMES

24:08 Yeah, it would be temporary. So, but I would imagine that you guys are gonna want some kind of compensation for is using it. They're not using it using, you know, so maybe that's a conversation to have with your group to see how you would build something like that like say, okay, well, we'll just build them, you know, for 15 users, plus or minus five, right?

--- *Pricing* ---

JAMES

24:29 And then that way we just constantly, we have one number that we pay you on the helper side for 15 helpers, and we may have 21 month, but we may have to in the next month, right? So we have a little plus or minus, there are some room but, you know, nonetheless, we both agree on the 15. And then if we started getting bigger and we move that number up to like 30 or something, you know, in that way you just always those four and we might be 30. We might be 20, who might be, you know, 40, you know? But if we could do something like that and just be, we'd have to build that relationship and negotiation and kind of have an understanding to keep it clean because I could see how it would get very messy as if you take a snapshot of our account, we have 30 30, you know, helpers and the next month we have 10 because of projects concluded. Yeah.

JUANITA

25:21 We can get creative when it comes to that, but we can, you know, table that conversation but it is good that you mentioned that because I can start having this conversation.

JAMES

25:31 But access to see, maybe there's some other groups that you have now that are going on the destruction or using this service trade for Construction and project management. The Progress billing is a question that I'm gonna have come up is because currently the way and this is probably going to have to get Chris involved. Because when we created invoice and service trade against the job, we get one invoice that sinks over to accounting. If we edit that invoice, if we modified, if we do anything to it after it's been submitted to accounting, it doesn't change and Sage at all, it will not resubmit to accounting software. So with Progress billing, how does that work? Now? That feature is going to be live, right? So we can do a test one and just put a test cane our Progress billing together. But I'd be very curious to see if we can produce multiple invoices for one job in service in Sage. Well, will carry over to Sage. Chris was able to integrate communication. So if I issue an invoice, I can see once payments posted in Sage, so that's very helpful so that we can see if that invoice has been paid or not paid or what the case may be. Because that's kind of I'm not in Sage at all. I don't want anything to do with Sage. We have, you know, two very smart ladies. Now, there's a deal with the Sage and invoicing posting payments. It's confusing to me. So I know service trade and that's where I wanna stay. But being able to see if an invoice has been paid or not paid is huge. So that's definitely a big benefit to me. And I imagine that's probably one of the KPI'S that I did pull on the enterprise side too. I've seen, you know, what's outstanding, what's you know, 90 plus days out, that kind of stuff.

JUANITA

27:23 Exactly. Yeah. I will ask our accounting resource specifically, Tanya. I don't know if you've ever met her.

JAMES

27:30 Hello, may have when we started.

JUANITA

27:32 She has a really close relationship with Chris and fixes. So I'm gonna ask her how that will look specifically like Progress billing into.

JAMES

27:40 If this works like we want it to, I think we can get Construction on board with that.

JUANITA

27:46 Okay. Is that BuildOps? Is it a trial that they're doing right now or is it?

JAMES

27:51 Yeah, we've already paid.

JUANITA

27:53 Is it like an it's an annual subscription?

JAMES

27:55 I think it's an annual subscription. We may have broken up quarterly or semi or something like that, but I know it's not a true.

--- Pricing ends ---

JUANITA

28:05 Okay. Cool.

JAMES

28:07 But it does not integrate with Sage.

JUANITA

28:12 Yeah.

JAMES

28:15 So, so once they're done with the project, they have to manually input all that.

JUANITA

28:24 Okay.

JUANITA

28:30 All right. What else you got for me? James, how service forums, tell me about service forums?

JAMES

28:37 Service forms is working. I think I'm probably ready to maybe add a few more forms at the first of the year... maybe see if we get a few more formula. If you guys have some starter kits for this specific assets. And then what you don't have, I don't know how much it would cost to start putting like latter inspection forms in there, but, or vehicle inspection forms, that kind of stuff. I might use blank paperwork for that, but I have like the service forms format, you know, if they go, hey, I'm gonna use my latter, I can just set up a recurring service per technician, you know, set the service for cane are, and then have it per technician, you know, monthly latter inspection, you know, monthly vehicle inspection, that kind of stuff and automatically creates a call and go in and fill out the form, save it to the call and we have track, you know what I mean?

JUANITA

29:32 Yeah, I will tell you there is a vehicle inspection... and, yeah, service forms.

JAMES

29:39 Assuming that demo over, so I can look at it, see what I'd ask?

JUANITA

29:43 And it's actually included with the purchase of service form or is it? Yeah. So let me add that to my list. I'm gonna reach out to service from support. I'll CC you on that email and basically just ask them to import it in your account.

JAMES

29:57 Okay. And then I'm going to be looking for like a bar unit B, IRD, it's like a wall unit.

JUANITA

30:06 That we do not have. I can.

JAMES

30:08 Okay. So it's pretty much like a package unit. It's just going to be a wall mounted union. I can try to find inspection form to kind of caveat off of... and then we can go from there... but we're using the heck out of service trade. I'll tell ya.

JUANITA

30:26 Love to hear it.

JAMES

30:28 Starting to starting to come together like I said, we need some internal changes. We've released somebody that was kind of being a little bit of a snag on some of the invoicing side of things. You know, the goal is to everything go through service trade, right? Both contacts, we're getting there was, it was a nightmare. So we've cleared that issue up. Probably another week or two will be streamlined back on invoicing. So we should start turnaround voices around in a day or two versus where it's been weekly, you know, sometimes two weeks to get an invoice out, which is tough. So... that kind of stuff. And then the recurring billing, I might need a little bit of support on that just to make sure I set up the right one so I can train the trainer so that I can go out and train Antonio on how to set up these recurring services once they are approved. And then the billing happens, I like the billing to happen with the recurring service.

JUANITA

31:30 Okay.

JAMES

31:31 So...

JUANITA

31:31 Sure.

JAMES

31:32 If there's a way that link that properly, you know, I'm sure you guys have a help section on that, but I might need to reach out to support or maybe set up a time for somebody to walk me through some of the recurring billing. So I can make sure we do it, right?

JUANITA

31:48 Yeah, that can be either support myself or actually Tam, they also do like best practice reviews like how to use. So during that three month trial, you can decide, you know, what you want to prioritize with them, but.

JAMES

32:03 Okay.

JUANITA

32:03 Any, anything else, you know, you can definitely use me or support as a resource.

JAMES

32:09 Gotcha. And then now, you know, also in that webinar, I saw that on actual calls with multiple service or one service. For that matter, the comments can be related directly to a individual service, correct attachments. So that that's a big deal that I think is going to help us out a lot too because when I have three services on there, I might have different comments for each service, right? So I'm I tell them, hey, we're going to do this first. And once we're done with that, I want you to go here, do this second comment and then they can add their attachments to that service only. And that way if another technician comes back out or if it's a recurring service, they can see the history on just that service. Not necessarily the job because that was a challenge for me too is like, I was like we'll just look back at the previous service. Now, there's nothing in.

JUANITA

33:00 Exactly.

JAMES

33:00 But that's because it was on the job.

JUANITA

33:03 But...

JAMES

33:03 Now, I gotta retrain them and hone in on how to, I kinda wish the view more option in the app, we didn't have to click that. I wish we just automatically in the app because the view more and you could view more than the technician at the layouts. Better. The options are better. I just, it gets cumbersome because of the back button so big up top that they get in there and start messing around and view more and they'll end up hitting that back arrow instead of the back button right below. It impacts them all the way out back into the app. And that it gets frustrating for the technician, right? Because if they spent 30 minutes in there playing around in the view more accidentally tab the wrong button, I guess.

JUANITA

33:46 I see, yeah, the details versus the great back button.

JAMES

33:50 Yeah... you can see how it's easy to hit the wrong backwards especially when you're ready and you may have a glare on your phone. It's natural instinct to just go back. And now we'll start.

JUANITA

34:02 Hello?

JAMES

34:04 So that's one thing that they have notated to me. You know, we get the occasional bug where they'll upload something, but I think I've narrowed down what that is. I don't think it's a bug that's my job items and they don't sweat the service and they click save, it disappears. So they think it didn't happen. So we'll put it in three packs but it's because they don't have it attached to the service. So if it was a little bit more clear on that job and it's getting attached to a specific service or not might help out, you know, with some of that... miscommunication, I had one happened to me where I was training, actually, I just put on there. Jerry the new tack, I just added, he's kind of split between Construction and myself for special projects. He's a pipe fitter, but it's also fabricator doesn't install stuff for me. So, he's done some guardrails and some airlines and I put them on service trade and I wanted to show him how to attach pictures and that kind of stuff. And now what type of service that I wanted these pictures attached to? And I selected multiple click upload, hit save. And once it saved, you just look, I didn't do anything. I did it twice. And now I got 46 pictures in there because even though I selected the service for some reason, it head above where it just wasn't connected to any service. And I can tell you what call that was, if you would like... heb... laying off... internet, it's moving slow, sorry one.

JUANITA

35:43 You're good.

JAMES

35:56 And it was job two seven, four zero, four, one four two.

JAMES

36:17 And then if you look at the first service where it's install one, it's black steel piping, you can see two attachments there. And then on the second call, you see the zero attachments, but I have 43 headsets below that, and probably 15 or maybe 20 of those attachments should have been on that second call, there's no way for me to move these attachments from the back end to a certain service. Once a.

JUANITA

36:49 So you had, initially, did you initially attach the attachments to the service itself?

JAMES

36:55 Via the app. So the mobile app.

JUANITA

36:58 I...

JAMES

36:58 Took his phone and we're showing him. Okay. Hey, so now let's click on the service. Well, we click view more than we clicked on the service. And then I have anything, give you more. I think I clicked on the service and we'll walkthrough right now. Service clicked. It went to... let's see that comes in.

JUANITA

37:18 Catch it.

JAMES

37:19 And then click attachments from here. Then went to gallery press and hold on the first picture and selected all the countries I wanted. Then click selected. And then the save button, click the save button. And then it just went back to attachments zero, just like this group. So for some reason, I just want to attach it to that service. I don't know why, but it's still even though it didn't attach the services still upload the photos twice. And that's why you'll see duplicate photos.

JUANITA

37:53 So in the app, it's not visible button, the desktop view it is.

JAMES

37:58 Well, I mean, you can see the attachments in the app, but, you know, how we're supposed to be attaching them to service? It wasn't go into the services, just go onto the job even though we clicked on the service. And then attachments from that point. And then at, so we, what job service attachments add, selected the photos we wanted to click, save those photos were then just say to the job, not the service even though we were in the service.

JUANITA

38:24 I see. Okay, I think, I know what's going on. So, I think this is lack of communication. I'm not gonna say lack of communication but lack of misunderstanding, internally, internal service trade as it relates to the new release of the project management features. I talked to one customer who talked to her frontline support team and they kind of got different answers. So I wanna make sure that we're relaying the right information to our customer base. But as I know today, yes, we can attach the attachments to the service level, but until the upcoming features are released, it actually gonna click and connect because right now it's not right? So.

JAMES

39:21 Hello, did connect on the first service when I did it. So if you open that call and you go to the first service and go to the...

JUANITA

39:32 Sixth, right?

JAMES

39:33 Was...

JUANITA

39:33 It, or they're both on the sixth install?

JAMES

39:37 Yeah. So the first one install one, it's black steel pipe and you go to attachments that they're on that service. So those two photos weren't the only thing I did different Juanita was, is I individually entities photos one at a time. So I wanted to where I select most multiple photos and try to upload them that it just says, no, we're going to put it into attach.

JUANITA

40:02 Okay. Okay. I follow.

JAMES

40:05 I think that might have been why now I can go into this call right now and try to attach a photo, a single photo and see if it works as a troubleshooting stuff.

JUANITA

40:20 That's okay. No need. I'm just gonna take the information and give it to support.

JAMES

40:28 And again, this isn't like end of the world stuff. But when something doesn't work like we expect, I just wanna let.

JUANITA

40:35 Absolutely. Yeah. And I...

JAMES

40:38 Doesn't start the process at all. It's just, hey, it worked here, but it didn't work here. I'm just curious, what did you, what did I do that causing that to add attachments? That second service?

JUANITA

40:48 Yeah. And maybe it's something as small as, instead of adding them individually versus like the camera more like going to your gallery, right?

JAMES

40:57 Be, it may not have the path?

JUANITA

40:59 Right. We don't know. Okay, cool. Okay. I follow, I'm gonna use this example... send that over to our team also with like the steps you mentioned that you did, and then I'll CC you on that email just for visibility.

JAMES

41:16 But I was, I added those first two photos by themselves for the still probably be, then if you're looking at attachments, you'll see who's roles more still piping all the black pipe for the airlines. I added those always in a group for that for service and you did the same thing. So it has to be when you're selecting multiple photos from gallery... it's gotta be because that's the only difference and that's why these other photos that upload to that for service.

JUANITA

41:46 Yeah, it sounds like that's the only thing you did differently and I mean, it seems like although it is small, I mean.

JAMES

41:54 Hi, he is, they have a task on service. So it, and, you know, most of our jobs, I tell these guys I want a ton of photos. You can have enough photo. So if we had this like each one has its.

JUANITA

42:06 Yeah. Okay. I will look into that a sap as well.

JAMES

42:12 Yeah. Having them in the job, they're on the job. So ultimately customer satisfied, but for us and reviewing and for other internal reasons, having it on a specific service for that day that he completed, it would be beneficial... to new filter to, by the way, per job is nice being able to filter what happened yesterday today last week. Yeah. Yeah. Being able to pinpoint down, you know? So we say, well, why don't

we have 24 hours on it yesterday. I mean, you guys were out there boom click it, get my answers, make more phone calls and move on.

JUANITA

42:44 Yep. That's now. Yeah, I really like that as well.

JUANITA

42:52 What's that?

JAMES

42:53 Performance tab.

JUANITA

42:56 Okay. Let me read you a list of items that.

JAMES

42:58 Okay.

JAMES

43:03 And this is all we want to be super users. You know what I mean? When you use every square and into service trainer, can?

JUANITA

43:10 And that's music to my ears. I mean, that's what we want. Yeah. So the first one is the performance tab eta on that?

JAMES

43:20 Yeah, just, I know he said this month when they were doing a Zoom, I want to hold them too.

JUANITA

43:26 Yeah. Me too good. And then I've got ask Tania our accounting resource about Progress billing, how that will look like in Sage that's number two, number three. I'm gonna contact service from support ticket, that vehicle inspection form into your account.

JAMES

43:44 Okay.

JUANITA

43:46 I'm gonna send you a little bit of information on the recurring invoices before you get started using that. And then I'm also going to contact support specific to this job that you gave me as an example... and the attachments.

JAMES

44:04 And again, this is why, you know, like the beta test because when you guys launch something, I can just let those developers know, hey, look, this is an issue we ran into.

JUANITA

44:14 Yeah. I think you'd be a great but beta tester.

JAMES

44:18 Yeah. I love, hey, look, this is something that we want to launch. Do you think it'll be helpful? Yeah, absolutely. Is try, I get it might cost some challenges on my end, but for the greater good of being able to use this as a feature on it, let's work through those challenges.

JUANITA

44:33 Yeah, I'm not, and I, we definitely talk very highly of you all.

JAMES

44:39 Hello? Thank you.

JUANITA

44:40 No, seriously, I mean you guys are great. You're awesome to work with. You use the heck out of service trade. So we, in our eyes, we consider you a power user. So any time like we're releasing new things or testing new things were like, hey, go talk to, you know, pay in our, hey, go talk to this customer because they've got their stuff together and you can learn from them, you know... awesome. So got a little bit of homework. I will knock this out James today as far as getting it started. But is, when it comes to hearing back from support on like this bug, for example, it may take just a couple of days. I do have one question will? Yeah.

JAMES

45:24 Hi, this is just a quick one. Let's say I have a time and material service call, right? Juanita. You call me, you're building is hot, right? You don't know po amount, you know, we don't know how much it's gonna cost. We come out, we're there for three days, we figure out what's going on. You approve repairs. We do it all. We, our job items, everything's in there on the job page. It would be beneficial of seeing... the markup costs as far as like, yeah, I get the unit cost, right? So that's my burn rate that's what it costs us to complete this job.

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JAMES

46:04 But being able to also see the total price, would it be helpful? You know, perfect example, you saw the TV, we do most of our businesses aged right? They have a very stripped accounting software, our policy that once they enter in red and it's approved that dollar amount to that change. So what ends up happening is we go out

performance service for ATP on time and material. I can investment of 1,500 bucks. We came in at 2,500. That's a problem because now they have to go and get approval to change that dollar amount. So if I could tell them, hey don't give me a po yet, I'll let you know once we're done what it costs without me actually creating an invoice. You get what I'm saying?

JUANITA

46:54 See you wanna see both price and cost on the job?

JAMES

46:57 It would be helpful before invoices created because we already have the contract in there. We know what our markup is for the customer. You know, I can take the 94 60 and throw 30 percent at it margin and try to come up with a rough number of where that projects and land form. But, you know, customer might say, well, how much are we in right now at this moment? While I look at it and I'm like, well, I know our burdens 94. I don't have a quick way to say, well, right now, today, we said 15,000... you know, without creating an invoice which I can click create invoice real quick and then cancel, avoid it can go back and reopened.

JUANITA

47:38 Not a lot of work.

JAMES

47:39 Yeah. Does that seem out of the realm of reason?

JUANITA

47:48 No. But... so... today, it's not included in core service trade, right? That would either fall as a feature request more. I know our technical account management team, they've developed an extension to service trade to show both price and cost on a job. So it is available. But in Tam world, we can give you access to it during the trial. But as far as like core service trade.

JAMES

48:29 CC getting pushed into service trade past?

JUANITA

48:32 Eventually, yes.

JAMES

48:33 Yeah.

JUANITA

48:34 But I'll add that.

JAMES

48:38 And the only reason I say this just because it would be silly that information's there. I just have to click invoice to get it.

JUANITA

48:46 For...

JAMES

48:46 I have to go and build a quote so that's extra steps, a quote that I'm gonna cancel anyhow because I already have a job. I just need to know with my current contract, what is 2,500 dollar for my material costs? What's that gonna cost the customer? You know, it's okay. It's just tough.

JAMES

49:13 Another one like CornerStone properties is one of those national accounts that ask, and then they give us a 500 dollar not to exceed to go out on site and figure out what's going on with the, right? So once we go on site, my guys diagnosed say, hey, look, we need another two hours. I can figure out the hourly that's fine. I'll tell him, you know, like 85 or whatever for another extension, but I need to control board this and this time is of the essence because we have a, not to exceed. So we're only allowed there and we may not get approved to do the repairs.

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JAMES

49:44 They may say, no, that's fine clock. I get out of there, but I need to be able to give them that costs on slack with the market so that they can adjust their invoice number so that whenever we are done, we can build them and everything's good.

JUANITA

50:03 Yeah, you're definitely not the first one to ask about this. Yeah. So.

JAMES

50:08 Can't imagine that it would be a request before? But?

JUANITA

50:11 Very comment. Yes, he remembers this. I know it's like it's Bright. They're just give it to me. Just let me see it, right? Okay. I'll add that to my list as well. James.

JAMES

50:25 Okay. I think that's it, Juanita.

JUANITA

50:28 Cool.

JAMES

50:30 Yeah, with a bunch of stuff, but.

JUANITA

50:32 No, you're totally fine. I mean, we haven't talked for a while, so... if you didn't have things for me are questions, I'd be worried so.

JAMES

50:41 I have a lot more now and we've to enterprise.

JUANITA

50:43 Yeah.

JAMES

50:46 It's all good reasons and we're asking.

JUANITA

50:48 For sure. I'll get working on that agreement. I can likely get it out today because I would also prefer to just get it out before I'm out of office.

JAMES

50:56 Get it done and that's why it solidified and we can move on.

JUANITA

50:59 Yeah. And then... yep, I will CC on those emails to support and we can follow up next week.

JAMES

51:07 Awesome.

JUANITA

51:09 Alright, thank you, James.

JAMES

51:10 Thanks, Juanita.

JUANITA

51:11 Have a good one. Bye.

The End