# ServiceTrade Demo with Glenn's Commercial Service LLC

Chris Kidwell with Glenn's Commercial Service LLC
Recorded on 3/19/21 via Custom Import 1, 1 hour 11 min.

# Participants

## SERVICETRADE

Chris Kidwell
*Field Manager*

## OTHER

Phone Caller #1

# Topics

# Transcript

CHRIS

0:00 Hey, Scott, can you hear me?

PHONE CALLER #1

0:01 Yep. I can hear you fine.

CHRIS

0:04 Hello. How are things going?

PHONE CALLER #1

0:08 Good. I've got Mike and TC with me also.

CHRIS

0:12 Okay. Hey, Michael TC.

PHONE CALLER #1

0:15 Hey, morning.

CHRIS

0:19 He saw, was reviewing some of the notes with tray. I have a couple of questions from my side and kind of what I want to get is an understanding of what you guys are trying to, you know, first, I understand your business and what you guys do.

*--- Type of work ---*

CHRIS

0:30 And then, and just get an understanding what you guys are trying to see today specifically. So, why don't you guys start by telling me a little bit about, you know, your... your typical workflows and your guys business?

PHONE CALLER #1

0:45 Okay. Typical workflows?

CHRIS

0:50 Maintenance service calls, pretty, you know, are you... are you guys, do you have a big preventative maintenance program? Is it more reactive service call type work?

PHONE CALLER #1

1:00 Yes, it's both. We have a pretty robust plan maintenance program with several customers, but we have a, we do a lot of demand emergency service calls, reactive service calls as well.

CHRIS

1:14 Okay. I...

PHONE CALLER #1

1:16 Think we're looking for something that's like pretty geared toward a service call because I think we had what price 6,000.

*--- Type of work ends ---*

PHONE CALLER #1

1:25 You know, we take a look at all that was our, that's our... our most. That happens the most the service call, so that, that's kind of, I think, you know, maybe what we'd like to see a kind of a demo on the workflow of it, you know, a typical service call.

*--- Accounting integrations ---*

PHONE CALLER #1

1:44 How does it work? If you've got, you know, to return next day, if you get multiple tax on it, just sort of how does that work?

CHRIS

1:53 Okay. Yep. And what do you guys use for your accounting system?

PHONE CALLER #1

2:01 Really, we're using Computerease and, but we're gonna... we're gonna switch most likely to Quickbooks for Sage. We haven't decided yet.

*--- Access to information ---*

CHRIS

2:18 Okay. Just not a fan of Computerease.

PHONE CALLER #1

2:24 It's just difficult for everybody to use, not user friendly for the field, you know, the office or the office?

CHRIS

2:34 And...

PHONE CALLER #1

2:34 We've yet to roll. We haven't even attempted the field build each portion of it because... it's very... user friendly from, I mean, we've attempted, I've tested some things and it looks like every... every action you take you have to save and backup and it looked like you take 20 minutes to complete an invoice.

*--- Type of work ---*

CHRIS

3:01 Yeah, yeah. There is no argument there, and I'm assuming you guys do some construction work then?

PHONE CALLER #1

3:11 Yeah. We do... we do some construction. Okay? That's a smaller piece of our... of our, you know, there's not as many projects. We probably have 100 projects a year and they can last anywhere from a couple of days to maybe six months in duration. Is a long one for us.

CHRIS

3:31 Okay. Okay. Cool. Alright. Superiors. And are you guys quoting out of Computerease or is that done through? Yeah, okay.

CHRIS

3:50 And so your technicians out in the field, are they still on paper?

PHONE CALLER #1

3:54 Yes.

CHRIS

3:59 And you guys are all commercial, right?

PHONE CALLER #1

4:01 Yes, sir.

CHRIS

4:08 Okay. And do you guys have any sort of timeline that you were looking at for this project in terms of... when you'd like to see this thing kind of be live?

*--- Type of work ends ---*

PHONE CALLER #1

4:24 I think we'd like to identify the one we're going with in probably the next... 45 days. And then.

PHONE CALLER #1

4:38 Yeah. I don't know that we've got it set time line on when we want to go live with. I think it kinda depends on the... other one here as well.

*--- Purchase decision ---*

CHRIS

4:49 Yeah. And then what else are you guys looking at then in terms of other service platform?

PHONE CALLER #1

4:57 We don't really know yet. We've looked at BuildOps and we're... we're gonna try to pick about four and narrow it down from there.

CHRIS

5:07 Yeah. What do you think of BuildOps?

PHONE CALLER #1

5:10 They did a good product.

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

CHRIS

5:13 Okay. Alright. I think that kinda gives me some things to kind of show you, are you guys doing inventory now?

PHONE CALLER #1

5:24 Yeah. So, well, yeah, we do something with her, but we're not like... we're not calling service trucks and stocking locations?

CHRIS

5:35 Yeah. Okay. And then just one more quick question on your... your preventative maintenance work.

*--- Type of work ---*

CHRIS

5:45 Is that like contracted work? Meaning you guys give us 50 grand and we service your equipment on a quarterly basis type contract work?

PHONE CALLER #1

CHRIS

5:54 It's a combination of... of that plus PNM as well. So we haven't... we haven't we have a mix of that.

CHRIS

6:07 Okay. Alright. I'll get an service trade will run a, what kind of run a service call and a preventative maintenance call. So you guys can see what that will look like as well as kinda doing a quote. So... you'll see some scheduling some dispatching you'll see what the field side looks like.

--- *Type of work ends* ---

CHRIS

6:27 And then kinds of our data model and I'll probably start with the data model to give you guys an understanding of.

PHONE CALLER #1

6:32 Can and can't do.

CHRIS

6:35 So as I'm kind of going through this, if you guys have any questions, just feel free to holler or... or let me know as well as if you see any glaring red flags that you guys just know is not going to be a fit.

--- *Type of work* ---

CHRIS

6:44 Let me know. So here's what service trade does, right? Our focus is going to be on the customer service side of the business and... and doing that, right? We're going to manage all of your technicians, are service contracts will track all your recurring services inside of service trade, right?

--- *Accounting integrations* ---

CHRIS

7:02 So obviously scheduling dispatching and your equipment records, right? All the pieces of equipment out in the field that you guys are servicing. Obviously, they'll be some overlap with the accounting, but we are not gonna take the place of Computerease, Sage, or Quickbooks, right? So you would continue to have your ERP system, but we'll bring over things like your items, customers, locations, obviously.

--- *Customer engagement* ---

CHRIS

7:23 And then really what we try to do is get your customers engaged with what you guys are doing digitally. And so this is kind of what I'll refer to as the Amazon effect, right? Giving your customers a portal that they can log into and see what's

happening. Have your service reports to be sent out... service history, customer reviews, quotes being sent out to your customer digitally.

*--- Recurring maintenance ---*

CHRIS

7:51 Our focus is 100 percent all commercial service contractors, right? So, so we're not in the residential space. So it's strictly folks that are kind of building some report with their customers being in there on a monthly, quarterly, annual semi annual basis.

*--- Recurring maintenance ends ---*

CHRIS

8:06 Obviously, our job is to help you grow as a software platform, right? So, so getting the most out of the resources you have today, what you're seeing there is a map based schedule it, right? So throw all a preventative maintenance calls up on a map. Let's filter these out and schedule.

*--- Customer engagement ---*

CHRIS

8:19 What makes sense... here's. The portal. We kind of have a say in the more that you give someone the more they're gonna want, right? And as you're giving your customers more information, more data, they're gonna want more and more from you, allowing you guys to charge a premium price for that data. And then the other thing that we challenge folks is, hey, look at how software can generate revenue, right? And one of that, one of those ways that we do that is turning these repair opportunities into revenue. We call this the... the efficiency loop... right? Of by kind of looks at how... how can software saved me money? How can software save me money? We say you guys may want to look at how software can generate more revenue? Any questions on the slides?

PHONE CALLER #1

9:03 Nope.

CHRIS

9:06 Too. So when you log into service trade... well, this is what the... the office view is gonna look like.

*--- Customer engagement ends ---*

CHRIS

9:14 Okay? Here's, a, we can filter this out specifically by offices. Okay? So if you guys had different offices, if you wanted to break it out into plumbing versus calling versus electrical, you can filter that down. You can also see the specific job types as well as any specific service lines that you have. Okay, obviously, this is a demo

account. So you wouldn't have this many service lines and then job owners and salespeople. So if you need to filter out specifically things that pertain to you can... are we on the right side will track all of the recent clock event features for each technician. So headquarters is obviously rally for us. So you can see all of our... our salespeople that are running demos, clocking in and out. And then this is just kind of a quick overview of a daily schedule, what's happening? And I can filter this specifically down by technicians if need be. I can see what's going on tomorrow. Okay? And as I scroll down will track overdo jobs without appointments, right? And so obviously this button, it wouldn't be that big. But that's quotes that have been approved or recurring services that haven't been scheduled out yet. Right side is recent clock events to right? And all of these will be hyperlinks to this digital job or work order... jobs out, appointments during the next two weeks, right? Well, never let you guys miss an opportunity to capture revenue. So this is just kind of have a recurring services or quotes that have been approved that are do within the next two weeks... past jobs to be marked completed, right? So our specific workflow here is technician out in the field. He does what he says, he needs to do. Once he's done there, somebody from the office is going to review that, this work order and we're going to go through this workflow.

*--- Invoicing ---*

CHRIS

10:49 And then once the office gives their stamp of approval, yeah, this is right. It moves down to this completed jobs to be invoice bucket. And then this point is where service trade starts to pull their hands out of the equation? Mean we get down to a pro forma invoice, and we push that to the accounting system, whatever it.

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

PHONE CALLER #1

11:04 Hey, Chris, can I ask you a question? So like, you know, there's... there's times that we run a service called the technician needs to order apart. So we get that mark. Currently, it's marked as continue to parts ordered. How would that show up in this field?

CHRIS

11:23 Yeah. So the technician and that can be done from the office view or the... the mobile side of things. And then you guys will just run your report of... show me jobs with all parts to be ordered. Show me jobs, all four parts ordered but not received. So, we jobs with all parts received.

PHONE CALLER #1

11:41 Yeah, yeah.

CHRIS

11:43 So we'll... we'll track all of those jobs and, you know, we... we can status parks and I'll show you what that looks like when we get onto the mobile side of things.

*--- Invoicing ---*

## CHRIS

11:50 Okay?

## PHONE CALLER #1

11:50 Is the, so our, is the invoice actually generated in service trade? And then like posted to Quickbooks? Or does it get, is the invoice generated in Quickbooks?

## CHRIS

12:04 Are going to generate the invoice because we're tracking all the data you guys are using out in the field, whether they're widgets, parts, filters, blah, blah, blah labor. And we're going to get here in a second, right? We're going to fill one of these out. And then at that point kind of falls back in your guys court is too if you want to invoice out of service trade or if you want to push that invoice to Quickbooks or Sage or Computerease an invoice for the customer from that side. Okay. So some flexibility and some options there for you guys depending on what you do... right? A quick side note going down a rabbit hole, we're seeing more and... more. And when I create an invoice, this will make sense. We're seeing more and more folks invoice out of service trade just because they like the flexibility of it and how quickly they can do it.

*--- Invoicing ends ---*

## CHRIS

12:46 So we're developing a whole new, you know, a whole new set of features coming from the invoice side of things. We've consistently said we're not the ERP, you should be invoicing out of your ERP, but the demands been there that... that we're kind of developing some invoice things.

*--- Recurring maintenance ---*

## CHRIS

13:04 And you'll see you'll want to get to when we get a work order down, you'll see what an invoice looks like. So... here's a specific location page inside of service trade. Okay. Right? So, Bill to you'll, have your Bill to be in Butler university, right? And then this is, we're actually have the reputation complex. So, walgreens CVS is target safeways, whatever it is, right? You'll have maybe 75, 100 locations underneath of one Bill to... this specific location. We'll track all of your services that you're supposed to complete, whether they were, you know, hey, we received the parts. We gotta go back to complete quarterly services, right? So we gotta do some rooftop quarterly services here. Okay. Semi annual work here, right? And we'll track a scheduling window, meaning when this specific recurring service has to be done... and you can see the different quarterly annual services. As I keep scrolling down for this specific location page here's.

*--- Assets ---*

## CHRIS

14:09 All of the jobs. And we use the term jobs and work orders interchangeable, right? So they mean the same thing inside of service trade. And all of these hyperlinks will take you directly to that specific digital work order... will track all the pieces of equipment out this specific location as well. Right? And again, this will take, you... you can click that link it'll. Take you to a little bit more detailed information about each piece of equipment, right? And I'll pull this up and you'll have this visibility from the field as well. And I'll show you. But, hey, here's, all the services that are tied to this piece of equipment here's. All the jobs that were ever done. Any deficiencies ever recorded on this piece of equipment, any quotes. And then we have the concept of parent assets, and child assets, if well. So if there were any sub assets underneath this specific piece of equipment that would be there. And then any asset attachments whether they be site plans, wiring diagrams, piping diagrams for this piece of equipment would live, there... is like keep scrolling down again specifically on this location page, right? We'll track all the deficiencies that have ever been recorded on this location, any quotes, and we're going to go through this whole process here in a couple of minutes. But any quotes that I've ever been recorded on this location... your contract pricing, when we... when we get to that quote, I'll show you guys kinda how, what contract pricing looks like. And then any comments that can be associated internal and external, right? So customer located comments, they can be specifically comments for technician or they can be specifically comments for a scheduling note. And then any location documentation. Again, this is kind of where would be some blueprints or drawings of the building or what have you guys documentation you need there?

CHRIS

15:58 Here's what the dispatch board is gonna look like. Okay? And this is just kind of the overview, the daily overview of what, what's happening.

*--- Assets ends ---*

CHRIS

16:07 Okay? Again, you can filter this out by specific offices if need be, right? And each technician is over here with their respective swim lanes, will track all of the available jobs up here too, right? So, hey, we have some preventative maintenance stuff. You can filter this out how you need to. So inspections installs PMS, right? So show me only the... the service calls we could do. And then all this is drag and drop, right? So, hey, it looks like Chris wants to do, need some extra more work. I can drag and drop that abc stores down the, Chris, his schedule. It calls out says he's not gonna make it. I can bring that down there and put it onto Danny scheduled. This is also where we will kind of add some job, right? So I can say, hey, families calling us... right? And they're saying it's a, it's an emergency service call and you can see all the different types of calls that we have. Okay? We're going to schedule this out for today. What time is it nine to 20? So we'll get to you by, you know, 10 30 or saying they have no heat?

PHONE CALLER #1

17:31 We have reason?

PHONE CALLER #1

17:52 Summer us, I don't know.

PHONE CALLER #1

18:00  Chris, can you hear us? Okay that I keep calling?

                         PHONE CALLER #1

18:10  Boss, Chris... Chris on... it. Was there a phone? Do you have the phone number
calling?

                         PHONE CALLER #1

18:24  Usually, it's on.

                         PHONE CALLER #1

18:33  Sure.

                         PHONE CALLER #1

18:41  Yeah.

                         PHONE CALLER #1

18:47  No wonder.

                              CHRIS

18:52  There.

                         PHONE CALLER #1

18:53  Yeah, we're still here pretty bad, Chris.

                              CHRIS

18:57  Twilight zone. I lost internet, my bad. I don't know when you guys dropped out.

                         PHONE CALLER #1

19:06  Yeah, you... you were just to kind of live in calls. Are you adding a job? I think.
Yeah.

                              CHRIS

19:13  Yeah. Okay. So, yeah. I mean, I was starting to see the lag and I'm like.

                         PHONE CALLER #1

19:18  Hello? Hello? Is.

                              CHRIS

19:19  Working working from home?

19:20 Way or something?

CHRIS

19:22 Yeah. So we're gonna take the spend way up, right? Service call. I think I had gotten into here. Let's say, let's get it to today. We'll get it to... you know, done by 10 30... we'll know all the pieces of equipment, right? So, I think this is kind of where I dropped out.

PHONE CALLER #1

19:40 Yep.

CHRIS

19:43 No heat, go and fix to see 750 bucks or something... right? We can associate that technician, but I'll click save and what that does is it drops into an on assigned bucket. I think I did too now. Yeah. So you can see I have emergency service call, just a regular service call here. Now that they're in the unassigned bucket, right? We can kind of see, hey, who's technician, who makes sense to get there the soon as, right? So I can say, Chris, you're going to grab this Fenway job after you're done, you're Butler health preventative maintenance job. So that's kind of what the dispatch board looks like?

PHONE CALLER #1

20:25 Hi, this is the call is how did the work orders get sent to the tax from the dispatch board?

CHRIS

20:30 Soon as I drop that onto Chris is account his schedule, he'll get an email notification... that... that... that, that's been dropped into his... his schedule. And then he'll have it in his application. So before we jump out into the field the other way.

PHONE CALLER #1

20:51 Hey, Chris on that. Can you, if you had something that was going to be multi day, can you get that both of the call like that was going to be a multi day call?

CHRIS

21:00 Yep. We can say, hey, this is going to be a, you know, a 10 hour job or 14 hour job.

*--- Tech time tracking ---*

CHRIS

21:06 Let's say it'll be 18 hours. Okay? And then you can also... so that's gonna run 18 hours if we needed to put it as a two day job, I think you can go.

CHRIS

21:22  No, yeah, you have to... you can say that will be a two day job. You just have to go to that specific job page to get it there. So I'll show you what that will look like.

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

PHONE CALLER #1

21:35  So, where did it? And where are you going? Now? What was that? How is this different than what you were just looking at?

CHRIS

21:42  So, this is a, this... this is the dispatch board. This is more of your as calls are coming in and you're just adding these calls to the specific technician that's where this is. I just click this little square and that's gonna bring me to this digital work order.

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

PHONE CALLER #1

21:59  So, you're looking at like a snapshot here of the... of the job in your... in your click in that to go actually into the edit the job.

CHRIS

22:08  Correct.

PHONE CALLER #1

22:09  Okay. So this is just a flat button right here. Gotcha. Okay. Yeah.

CHRIS

22:13  And so this is gonna, I click that little square and it brings me specifically to the actual digital work order... right?

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

CHRIS

22:21  And this is where you can kind of say, hey, we gotta add another appointment to it. Okay? And this will be tomorrow.

PHONE CALLER #1

22:29  So, if you've got somebody, so if you've got the same text, it's going to be on the job two days. You're going to create two appointments.

CHRIS

22:37  Correct.

PHONE CALLER #1

22:38 At, at the... at the... the... the initial call, you know, he's going to be there for two days, so you could set, you can... you can set to appointments for two different days, right?

CHRIS

22:46 That's right?

PHONE CALLER #1

22:47 And then, so when you do that, you can also, so if a text going to be there tomorrow for the first part of the job and he's gotta go back seven days later for the second part of job, you can go ahead and schedule that appointment for seven days, right?

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

CHRIS

23:03 That's right?

PHONE CALLER #1

23:06 After, when the job gets complete, it comes back end to be massage by the office. They're... they're seeing all the appointments and visits and whatever. And if you've got it too, if you've got attacking a helper on this job, you would create... an additional appointment for the helper.

CHRIS

23:29 We can just associate another technician here.

PHONE CALLER #1

23:32 Okay.

CHRIS

23:34 Right. So, a couple of different ways that can happen. The other side of that too is... is and we'll go through this here in a second. But, you know, hey, this specific work order, we know we need a labor here, right?

*--- Tech time tracking ---*

CHRIS

23:47 So we're going to have some... some it's just called air solutions labor. And then we also have a help or labor. Okay? And then you can source these two to a specific technician, right? So this labor we'll get source to Danny because we pay Danny different labor rate than what we would pay Chris.

PHONE CALLER #1

24:05 And so, and it's so what that allows you to do is... is if you've got the, you've got a primary technician helper about the helper may change depending on the job or the timing... you can... you can... you can... you can edit in here. And so the two you're reflecting the different labor rates if you need to pick up.

*--- Pricing ---*

PHONE CALLER #1

24:24 So first time you had Chris, that's our second time you hit Danny out there, you... you would see the adjustment and you can have, you have a different labor rate for that.

CHRIS

24:35 That's right? So our costs right here, right? We can see Danny, 17 bucks, and Chris can well as 100 bucks.

*--- Pricing ends ---*

PHONE CALLER #1

24:46 I usually like to 17, but guys use it pretty dedicated.

CHRIS

24:51 There's something goes boom and then you're like, why do we send the cheat guy?

PHONE CALLER #1

24:57 Got a blank somebody.

CHRIS

24:59 That's right? The other... the other side of scheduling is we can run a report and this is what we call service opportunities, right?

*--- Recurring maintenance ---*

CHRIS

25:08 And I'll just pick out of the coin office. Hopefully some stuff comes up... and this is a approve services would be quotes that have been approved. Recurring. Is... is that all of our schedule PMS, right? And then one time and all services self explanatory. And again, you can kind of filter this out specifically to, right? So hey, we... we wanted to see specifically things that are associated with Chris because Chris has a bucket full of recurring services that he handles. But what this is doing is this is just scouring through every single location inside of service trade that we have some sort of recurring service setup.

*--- Recurring maintenance ends ---*

25:43 And I'll just click a couple of these... right? And as I kind of scroll down, I'll see that, hey, we have 400 guys expect to be two hours, 400 bucks for quarterly preventative maintenance. I don't know what that quick counter sales is. Somebody was doing some testing, but hey, we got a duck growing company. They're a three month PM for four hours, 350 bucks, blah, blah blah. So just kind of gives you guys some quick overviews as to what's happening. And then we can go ahead and create our preventative maintenance jobs. And here's another way that we can also schedule out some things too, right? So these could also be some construction jobs as well. But, or... or, you know, specialty install, I shouldn't say construction. But well, next thing we're gonna do is we're gonna filter this down a little bit further if need be, right? If these were PM, we can say, hey, beginning of the month, show me only the ones that are bigger. I wanna see 1,000 dollars in higher type preventative maintenance. But we're then gonna throw all these things up on the map. And then the next thing I'm gonna do is just go and click, see all drill down a little bit. Obviously, you guys would have the entire United States, but each one of these bubbles is color coded to a specific technician. Once they have a calendar icon in there, it means that they have an appointment associated with it. And the gray means that we have nothing associated with it, right? So then all of this is drag and drop to. So I can kind of say, hey, Chris, you're going to be out there in Atlanta and you can see that... that bubble just turned color coded. Now, we know Chris is associated with it, and we can drag and drop that down for Saturday. If I know this job is going to be a, you know, again, a two day job. I can, turn that into a two day job and you can see now we have to appointment set for that job. If we know we need to text on that job too, right? I can drag and drop Danny on that job as well. You can see Danny is now populated on that Ben since job.

CHRIS

27:42 Right? It could be a three day appointment. It doesn't matter how long it is.

PHONE CALLER #1

27:46 And how did you know that is, so that the technicians or just associated you'll set up the markets that the technicians are associated with is how they... they show up on the bubble here? Have, you know that Jeff is in Birmingham? It's not GPS track or anything like that. It's just you, it's... it's all manually done.

CHRIS

28:08 Yeah. So it's not a fleet tracking system, meaning, you know, how... how fast am I going from zero to 60 and how hard am I breaking? What we do have is... is basically what folks will do. What our customers will do is they'll kind of have two screens working this one with where the technician locations are next to. I'm... sorry, this... this screen, right? So we'll kind of have a little bit obviously drill down lot farther and we would know kind of where technicians are. This is more of like a... a planning the... the... the week out or the month out.

CHRIS

28:50 Any questions? Any other questions?

PHONE CALLER #1

28:56 No, I have my, I think, are you thinking too in terms of we have local text and we have like some subjects. Yeah. Just like I didn't want to actually different branches. It's two different branches. But, you know, what I was trying to figure out is... is that you just don't I just don't want to have a big blah blah... blah blah... blah blah... blah, blah, right? Guys are there and so.

*--- Dispatch ---*

CHRIS

29:19 So you can filter this out to, right? So, hey, we can take Chris off the calendar. If we don't wanna see Chris, we can take Danny off, right? If I take time off, we can take him off of that calendar too. So you don't see those specific technicians. So, so some of that can be filtered out specifically.

*--- Dispatch ends ---*

PHONE CALLER #1

29:39 Okay.

CHRIS

29:41 Right. And we can, you know, if you wanted to split this up into a Lexington office versus the Louisville office, right? We could... we could turn Louisville off. So we're only looking at Lexington and then we can just put Louisville back on or vice versa.

CHRIS

29:59 Right? So you have the clients that service trade, you have the concept of different offices if you guys wanted to Louisville versus Lexington.

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

PHONE CALLER #1

30:08 Okay.

CHRIS

30:12 Alright. Let's jump out into the field. We're going to run two jobs out in the field, right? So the first one we got as this preventative maintenance... job that we have here. So here's my here's, what you guys can see my app, right?

PHONE CALLER #1

30:30 Yep. Yep.

CHRIS

30:33 Cool. So let's grab this Butler job. Okay? Down here at the bottom, we have three o'clock features, okay? Job prep. You know, I gotta run to the wholesaler, grab

some parts in route, right? So here, we can go ahead and notify the customer of when we'll be out onto onsite offsite... Scott. So I'll send that to you and we can just go ahead and say that, hey, we're... we're now traveling, right? We're... we're well on our way. I'm going to go ahead and clock in, pretend like we're on site. So now that we're actually on site here's, what the technicians are gonna see. And I see these is, you know, specific titles if you will. Here's, our three services that we're going to do.

*--- Quote templates ---*

CHRIS

31:17 Okay? And this is all your verbiage, right? So you guys will put all this verbiage in building out templates inside of service trade... here's, comments, right? So comments can be associated again with the job or the location in this talk to text customers. Happy? I'm all done here.

*--- Deficiencies ---*

CHRIS

31:37 Okay. Attachments. This is where we can start building out some before and after pictures, right? Cleaning the coil, doing what we're supposed to be doing, whatever it needs to be... right? Those can be audio video, videos, contacts, pretty self explanatory, I'll get the paperwork in a second. There's job items, right?

*--- Assets ---*

CHRIS

31:59 Because this was a preventative maintenance program. These items were automatically flow to this specific work order. Okay? And this is kind of where we can add items to as well, right? So, hey, I had to use an extra widget. Okay? I can associated with a specific service. I mean, I can tide that to a specific asset if need be, if we wanted to track that information. Okay? We can say we use to cost.

*--- Quote templates ---*

PHONE CALLER #1

32:25 Like that on the pre loaded. So like the pre loaded once you know, let's say you're... you're going to go do a... a PM on... on a rooftop unit. So you would think, you know, you might have some filters are built on there. So do you, or is that texting like going into those items?

*--- Quote templates ends ---*

PHONE CALLER #1

32:43 Let's say there was two filters and a Bill. So would they go into those items in like assign them to something or is it already on their assigned and they have to say they use them or has it was, how's that work?

CHRIS

<span style="font-size:smaller">32:55</span> Yeah, great question. So, in the office side of things, right?

*--- Recurring maintenance ---*

CHRIS

<span style="font-size:smaller">32:59</span> We have three preventative, we have three pieces of equipment. We gotta do a preventative maintenance on this automatically happens. So every time we do a quarterly PM, these one, two, three, four or five items that are associated with this quarterly PM automatically flow to that work order. This one only needs to items, right?

*--- Quote templates ---*

CHRIS

<span style="font-size:smaller">33:17</span> Whatever you guys build out, typically, most people create a template, meaning every time we're doing a chiller, we use these six items and whatever those six items are, will automatically flow to that work order every time you schedule it. Okay?

PHONE CALLER #1

<span style="font-size:smaller">33:32</span> So that then they're all the tech is doing then is adding is labor check. Is all he's doing is adding clocking in and out of the job and doing the tasks.

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

CHRIS

<span style="font-size:smaller">33:43</span> Right. Yeah, that's right. That's the, you know, hey, I was supposed to use more filters I used for filters. I'm good technician doesn't even touch anything. He clocks in, actually does the work that he's supposed to do and clocks out and he's right? He's on his way. He doesn't have to add these items.

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

CHRIS

<span style="font-size:smaller">33:58</span> This is kind of like a oops. I just need to just... just kind of showing you guys what it looks like to add some... some park. Yeah.

PHONE CALLER #1

<span style="font-size:smaller">34:05</span> Yeah. Okay.

CHRIS

<span style="font-size:smaller">34:08</span> Can also source these items to, right? So kinda showed you this with the office view looks like as well as what the technician can do.

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

CHRIS

34:14 So, hey, I pulled these off of a truck one. Okay, right? We could have sourcing from a wholesaler too, and I'll show you what that looks like on a, you know, on a service call as well. But that's kind of what job items look like on... on the preventive maintenance side... here's.

--- *Assets* ---

CHRIS

34:34 All the pieces of equipment that we have on site, right? So I can look at everything that's out here. Okay? And if I need to get a history on whatever piece of equipment, I can click into that rooftop to unit, right? I can get a full service history here's.

--- *Deficiencies* ---

CHRIS

34:45 Everything that's ever been done. I can click this specific job and go a little bit further in the details and get more information. I can see any deficiency that's ever been reported, right? So, hey, I could come here and see the pictures to this bad deficient that's bad compress or whatever it was. Okay. And then...

PHONE CALLER #1

35:05 Gosh efficiency. So, are the deficiencies use to create like a quote opportunity?

CHRIS

35:10 Yep. We're going to jump there. One second. Yeah. So that's essentially exactly what that is, right? So I can next button I click was the attachments, right? And this can be the piping diagrams, rating plates, whatever it needs to be, that's associated with that piece of equipment.

--- *Assets* ---

CHRIS

35:27 And then we'll track pertinent information, right? Model number, serial numbers, voltage belt filter sizes... so that's kind of the... the equipment management or asset side to your question deficiency, right? So hey, we're here to do a preventative maintenance and I found a broken compressor... right? And you guys can just use some imagination.

--- *Deficiencies* ---

CHRIS

35:49 This can be whatever it needs to be. This is where we're going to start building out some of these, you know, the... the social media aspect... people's brains are wired to respond the pictures, right? So we kind of want to show the customer what's really broken and... and these could be videos too, right? So... I could do a video, I'm doing photos. I can do audio memos too, right? So, hey... hey, this messages for the

office. I need carrier compressor, blue, abc, part number one, two three. We're going to need a 20 foot latter. I'm gonna need to help her. And it's gonna take me eight hours to swap this thing out.

--- *Access to information* ---

CHRIS

36:33 Obviously, you guys can see my... my bad internet, right? So the point there is... is everything will cash. So wants to technician clock into the job. He has to have a signal to clock into the job. But everything you've seen so far the technician can do on online offline, everything will cash.

--- *Deficiencies* ---

CHRIS

36:47 And then as soon as he catches a signal to push out to the cloud... but I'll click next. Let's say it's an operable. Okay. We're gonna associated with that piece of equipment, right? Let's say we're still going to stay on that rooftop to unit, let's click next. We're gonna say that's a new deficiency and we need to fix it a sap.

--- *Deficiencies ends* ---

CHRIS

37:11 So that's kind of recording a deficiency inside of service trade.

CHRIS

37:18 Questions there?

PHONE CALLER #1

37:21 How do you, how do you list what work was done on VM or like with the text it?

CHRIS

37:29 Do you, what do you mean elaborate a little bit more?

PHONE CALLER #1

37:33 Like, so the tech is going out and doing this PM, is there anywhere in here? He says perform PM, you know, per task list or whatever?

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

CHRIS

37:42 Ticket there are on a comment?

PHONE CALLER #1

That's not really common is not like inner office that goes to the tech or to the customer.

CHRIS

37:54 So, okay. So you... you want to see the customer facing side of things.

PHONE CALLER #1

37:58 Yeah, yeah. Like how does that like in the work order, where does the tech, but down, what... what he's doing?

*--- Forms ---*

CHRIS

38:05 Yeah. Give me... give me one second. We'll... we'll get that in one.

PHONE CALLER #1

38:09 Okay.

CHRIS

38:10 And I'll show you what the I'll... I'll actually send you the report. So you can see what that will look like from the customer side. Do you guys have tasking sheets of preventative maintenance sheets that the like checklist the technicians are required?

*--- Assets ---*

PHONE CALLER #1

38:24 Yes. Yes.

CHRIS

38:26 So, then the next step there is technicians going to click view more details. Okay? This is just gonna bring him to a more granular view of this specific location, right? We're not going to go through all this for time purposes, but hey, here's, the job items that we were at here's. That rooftop unit, you can see the deficiency that I recorded, but what technicians are going to do at the top, right? You'll click actions, download blank paperwork, right? And this is where you guys will dictate how you dispatch your paperwork based off of location services or because of equipment out onsite.

*--- Forms ---*

CHRIS

39:00 But these will be your guys forums that technicians will fill out of whatever they'd be, right? So, hey, a maintenance report, a checklist, they will come in through here, right? Start to say, yes, no, pass, fail check. All these... these would all be fill ubl inside your guys account.

CHRIS

39:17 And then all the technician has to do is just click that box in the top right corner. And then we're just gonna click add to service trade... and we'll upload that paperwork in the service trade.

CHRIS

39:36 I'm assuming you guys are capturing signatures out in the.

PHONE CALLER #1

39:38 Hello? Yes.

CHRIS

39:41 So next step is just essentially the creative work acknowledgement.

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

CHRIS

39:44 Scott, I'll pick you as my contact. I think if I can find your name there we go, right? So hey, Scott is going to be pretending like he's the customer. We're still in the technician side. I'm going to say, hey, this is all right. This looks good. I'm gonna turn that audio off that was meant for the office.

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

CHRIS

40:04 But now I'm going to review this and turn my tablet around with Scott. And Scott is like, hey, we were out here to do this here's. The services that we completed and customer is going to give us a couple of different ways right here's. All the parts that we used here's.

*--- Customer engagement (quoting and invoicing) ---*

CHRIS

40:18 My before and after pictures videos. If they were there, I'm going to acknowledge and confirm that this has been done, right? So Scott, as the customer's going to go ahead and sign this, Scott. Sorry about that signature. You can turn this off. So you don't send this to the customer right?

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

CHRIS

40:34 At this point, but I'm gonna just show you so you can see what it looks like. Most people have it off because they want the office to review it first. So you'll get an

email confirmation as a technician. I'm essentially done. I'm walking off the job. I'm going to go ahead and clock out. So a couple of things happen here, right? So if for whatever reason, I didn't get one of these services down, I would leave it blank. So we know in the office that means still needs to be completed. I'll go ahead and mark all those complete that I did everything that I was supposed to do. And again, are you done with this visit? Meaning no, I... I may need to come back here tomorrow morning at eight AM or, yes. I am done with this visit and even have a service wasn't complete, we can schedule different tack to go complete that specific service. So I'll finished clocking out. I'm now on my way to go grab the spend way emergency service call job. And I'm clock and, you know, I'm going to do the whole in route clock in on site again thing.

## PHONE CALLER #1

41:34 Good question. Like say we're going into this then way call, is there a way to set up a like a rule at a... at a site or like a customer level? So, for instance, like hey, when you get to thin way... you have to do this before you can certainly work order whether it be, you know, checking on an SDR or checking with manager or, you know, something like a create certain... certain rules that you, that a tech has to do before they can complete or start a call, whatever.

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

## CHRIS

42:17 So, short answer is... is, no, we don't want to restrict the check. We... we kind of have a philosophy of not restricting the technicians workflow.

## PHONE CALLER #1

42:28 You...

## CHRIS

42:28 Can certainly put it in the job description, meaning like, hey, you need to touch base with XYZ contact or you need to fill out your?

*--- Recurring maintenance ---*

## PHONE CALLER #1

42:36 Was it has to be put in every time a jobs created?

## CHRIS

42:41 No. So you can set up rules inside of service trade that anytime we do work at Fenway, this automatically happens but it's... it's like a it'll be like a job description or service, right? So, hey, could you could also set it up to be a service? Meaning you must fill out your... your safety checklist before you can step onto this location type stuff?

## PHONE CALLER #1

43:05 Yeah, it can be set up as like a service at an individual site level, or could it be, hey, let's say you've got, you know... the customer that has five sites that we have to do the same thing at each site. Could it be setup? Is that like a customer level that cascades to all the sites? Or do you have to set it up at each individual site level?

*--- Recurring maintenance ends ---*

CHRIS

43:26 That's right now, you can set it up either or.

PHONE CALLER #1

43:29 Okay.

CHRIS

43:31 Yeah. So, you know, again, just, it's not gonna stop the technician. Like, hey, you can't actually do anything, but we can kinda say you need to do this first aspect. If that makes sense... right? Technician could still go clock in and do what he needs to do.

*--- Forms ---*

CHRIS

43:48 I'm not gonna force them to fill out paperwork, but we can say you need to fill out your paperwork before you do any of this stuff... anyways. The... the, I think that let me know if that didn't clarify that up at all?

PHONE CALLER #1

44:02 No, it makes sense. Yeah, I got it.

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

CHRIS

44:05 Right. So, I'm not gonna go through this whole workflow down, right? Hey, we can kind of see some job items here. You remember these... these items that we added back out in the office. They're automatically here. Okay? I can come in here and say, hey, you know, I had to use a filter. Okay, it costs 250 bucks. I'm gonna sources from a parts vendor. You know, I grabbed it from abc parts. Okay. Po number was, you know, whatever that needs to be, and then the status to, right? So not yet ordered... ordered and received meeting. I'm gonna put not yet orders, somebody from the office needs to order this part.

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

CHRIS

44:43 I'm going to go ahead and order it and let's just say it's supposed to be here the 20 fourth. Okay. And then again, I showed you guys earlier on the jobs tab as to how

you can search for all those parts, right?

PHONE CALLER #1

44:59 Well, that, would that help or if this job head to text and with the helper, this, do you know, clock in and out? Not have to fill out any other pieces of the job?

*--- Tech time tracking ---*

CHRIS

45:12 Typically dependent on how you guys define helper and what they're doing. Yeah, sure. They can clock in. They can clock out. They don't even have to clock in and clock out if you don't want. That can certainly be a space... space on a scheduling board. Most people typically have their help or go do stuff through the application.

*--- Quote templates ---*

CHRIS

45:33 Go take pictures, go do this, go, you know, add some job items. But to your point, yeah, there's typically a lead... who's kind of in charge of doing whatever it is that needs to be done and he dictates or he or she dictates a lot of the, what's being entered into the app.

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

CHRIS

45:48 So, from... from our side, I don't care if you actually have four or five eight on a specific work order, entering information. It doesn't matter. It's all cloud based and not.

PHONE CALLER #1

45:59 Yeah.

CHRIS

46:02 We'll just pretend like we're... we're done here, right? We're gonna mark that complete finished clocking out technician is... is done? We're going to jump back in the office and complete a work order and kinda show you what that looks like. Any questions from the field side?

PHONE CALLER #1

46:18 Hi, is this on a service call? Yeah?

CHRIS

46:21 I was just a service call?

PHONE CALLER #1

46:23 Okay. So... the technician goes out there, he's not working. Where does he report what he did?

--- *Deficiencies* ---

CHRIS

46:32 Sure. So... you know, we can go grab the spend way job and just say, hey... I...

PHONE CALLER #1

46:43 Michigan...

CHRIS

46:45 Mission.

PHONE CALLER #1

46:46 Igniter. I cleaned igniter. Yeah.

CHRIS

46:50 I cleaned igniter... we can go ahead and add that comment there... right? And I can associate that specifically with the job.

PHONE CALLER #1

46:59 And what if he also change the ignition module and he took it off his truck out of his truck stop?

--- *Deficiencies ends* ---

CHRIS

47:05 Sure. So, we'll clock back in and we'll say, hey, I pulled out a... a, you know, an ignition module. We're not gonna have that inside of service trade, right? So if we did, we could, I could just grab a filter. I know there's a filter in here, but point is I use an ignition module... which I gotta enter it here, ignition module, right?

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

CHRIS

47:31 And I source this, I... I, yeah, this off of my under my warehouse, we pulled it off the truck one.

CHRIS

47:45 So that's adding an admission module that came off the truck one.

PHONE CALLER #1

47:50 Okay.

PHONE CALLER #1

47:58 Any...

CHRIS

47:59 What else? Anything else?

PHONE CALLER #1

48:02 I think that's it.

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

CHRIS

48:04 Okay. Alright. So back in the back office, we kind of have two jobs going on here. If you remember our preventative maintenance that we were working on here's, this preventative maintenance.

PHONE CALLER #1

48:17 So, so, can you just show us like real quick? So like, alright, that was, where would that fall? I know you had that completed but not review, not invoice. So, like, where would they go to? Okay... okay?

*--- Pricing ---*

CHRIS

48:32 If somebody would be living in this bucket, right? Obviously, again the demo account, you guys wouldn't have 5,574... right? But somebody whose job is to make sure this bucket stays at zero or does their best to keep this bucket at zero. And so, all of these would be hyperlinks that would take you specifically to that digital?

*--- Dispatch ---*

PHONE CALLER #1

48:51 Hello. Can you, is that one that we just did on that bucket?

CHRIS

48:55 Yeah, it's all the way down at the bottom. I'd have to go find it.

PHONE CALLER #1

49:00 Any filter by the job number? Like livid or, yeah, scheduled for. And so it shows.

CHRIS

<sub>49:09</sub> I cannot filter out this specific bucket. I'd have to go look for it. And it would take me probably a sec.

### --- *Pricing* ---

### PHONE CALLER #1

<sub>49:19</sub> That's okay. All right.

### CHRIS

<sub>49:22</sub> I think, you know, obviously, you guys wouldn't have 5,574. So you'd... you'd have 50 20 10 of these, right? So you wouldn't be scouring through that. And then it would take you right here to that, what that digital work order.

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

### CHRIS

<sub>49:38</sub> It looks like. You can see the technician said he completed everything that he did. All of these buttons are now all of these services are completed, we're technically still in progress because the office needs to give a green light on this thing. As I scroll down, I can see, hey, Chris added a widget, he pulled that from his truck, right?

### --- *ST app contracts and pricing* ---

### CHRIS

<sub>49:57</sub> He used four of them. He added any other items he could do that... that would be here as well. You can also, if you need to fix this kind of saying, hey, Chris, no, we don't charge for widgets or you will flag the fact that the standard cost is 12 dollars. I don't know why Chris put 50 dollars here, right? Point is.

### --- *Parts management (purchase orders)* ---

### PHONE CALLER #1

<sub>50:15</sub> Would you see? So where would it show up as, hey, I had to order, I had to order a widget from a supply house and we have an open po that we have not received the invoice on. So we don't know what to charge because we don't know what they charge us for freight. So, how... how do you see that? Like you've got an open po on this job that hasn't been received... but it's been the parts been put on. We haven't received the invoice yet.

### CHRIS

<sub>50:47</sub> Yep. So we got apart. So you're trying to.

### PHONE CALLER #1

<sub>50:52</sub> You, you...

### CHRIS

50:53 Bought the part, you purchase the part, you've installed it, but you have not captured the invoice yet.

PHONE CALLER #1

50:59 Have not received the invoice from the vendor yet. So, I haven't... I haven't you know, received the invoice on the po?

CHRIS

51:08 Right. Yeah. So how long does it take you guys to get your invoices from the vendors?

PHONE CALLER #1

51:14 It varies. Sometimes it can be instantaneous. Sometimes it can be, you know, a week?

CHRIS

51:20 And are you waiting to get those invoices from the vendor before your invoicing, your customer?

PHONE CALLER #1

51:27 Sometimes we are, yes, because there may be, and... and, you know, afraid item on that... that, we don't know what that is. We don't get that cost until we get the final and.

*--- Invoicing ---*

CHRIS

51:37 Yeah. Yeah. Okay. So... some of that's going to be how you guys want that to work. Meaning if... if, hey, we're we have to wait for this part. Okay? We would just status, this is as received, but we're not gonna actually invoice this until we get this invoice from the customer, right? So it would just be in the completed jobs to be invoice.

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

PHONE CALLER #1

52:00 How would I know? Like how would I know then, where would it show? Like I get? Let's say I get the invoice? Is there something show in like the po has been, you know, receive for, how do I know... if that, if I have got the invoice on that?

*--- Accounting integrations ---*

CHRIS

52:20 Yeah. So you're starting to get into the... part of the accounting integration conversation which is going to go down some rabbit holes, right? So... for example,

we have... we have a integration with Computerease. So some of that's going to dictate how you guys are cutting po is where you want to cut po is from, and... and how you're managing ap, and they are, so, and vendor invoices, right?

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

CHRIS

52:47 We have a product called partsledger, which is more of an inventory management, parts, purchasing procurement system that... that lives behind service trade... that handles some of what you're talking about, where... you know, hey, this part is here and we're cutting POS out of partsledger. And then when we get this part and we received the part of partsledger, and received the invoice that through partsledger, it will automatically update the costing here inside of service trade with the appropriate cost that you guys receive that part from. But again, that's going to be kinda tied to the accounting system and how we're receiving invoices from wholesalers.

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

CHRIS

53:27 And if... if you guys want to wait to invoice your customer, we can certainly just status these. We can also tag these work orders, right? Like, hey, we gotta wait for invoice. So that when you guys come to this specific job, you'll see a tag that says waiting for wholesaler invoice. So you'll know not to do anything with it.

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

PHONE CALLER #1

53:48 Yeah.

CHRIS

53:51 Long roundabout way to answer your question?

PHONE CALLER #1

53:57 Okay. I got, yeah, kinda digress there. So I'm sorry, keep going.

CHRIS

54:01 No worries. Good questions. Hey, as I continue to scroll down, we'll track all your clock events, the pieces of equipment we were out there supposed to be servicing as well as this deficiency, right?

*--- Quoting ---*

CHRIS

54:14 Hey, we believe we should be turning quotes around as fast as possible, right? It's kinda one of those things out of sight, out of mind. If it wasn't that important,

you guys didn't quoted that quickly, probably, you know, I probably isn't that
important. So what I'm gonna do is just kinda show you real quick because we're
running out of time.

*--- Quote templates ---*

CHRIS

54:29 What a quote looks like? Let's just put expiration date, the end of month. Let's
create a quote. The next thing I'm gonna do is throw a template up. I think you guys
probably have some templates built out in Computerease... right? So, hey, we were
doing a... a compressor replace when I think, right? So I'll just don't compress
replacement. This is all your verbiage... right? These are the typical items that we
have for compressor replacements. So let's just add that template on, huh?

PHONE CALLER #1

54:58 Yes.

CHRIS

55:00 Okay. I can edit this if need be, right? If you remember, Chris said he needed
eight hours of labor, not three.

*--- Quote templates ends ---*

CHRIS

55:07 Okay. We need to 20 foot latter to, right? So, hey, if there was like a rental fee or
something or whatever, something that's not, we had a special blue compression. I'm
sorry... right. So, parts that are one off... that aren't in service trade, well, you guys
can enter in as well, right?

*--- ST app contracts and pricing ---*

CHRIS

55:24 And then you can just say it's gonna cost and 1,250 bucks or build a customer
1900 dollars. Okay. You can choose how you want to show this to the customer.
Okay? If it was Tina, I'm grand total only as well as all of your... your market rules,
right? So, as I change here, these... these contract pricing, the market rules will
change. So gold silver bronze level pricing structure will all live there. And as well, as
if I change this, right? We'll flag the fact that we change that standard call should be
35 dollars, not 55, but we won't stop that workflow.

*--- Customer engagement (quoting and invoicing) ---*

CHRIS

55:58 I'll just go ahead and click save. The next thing I'm gonna do is send this to you,
Scott. You'll be my primary contact. We turn that audio off because that was
supposed to be internal, right? And again, you guys can pick and choose what you
want to show to the customer. I don't know if you have access to your email Scott?

PHONE CALLER #1

56:16 Got it on my phone.

CHRIS

56:18 Sure. So if you refresh that inbox, you should be, you should have a... a, an email that says this quote was there.

PHONE CALLER #1

56:27 Yup. Repair Butler health and recreate outgrown it.

CHRIS

56:32 Yep. If you scroll down a little bit, you'll see view and respond the quote.

*--- Customer engagement (quoting and invoicing) ---*

PHONE CALLER #1

56:36 Hello?

CHRIS

56:37 Hello, pull it up, right? That. And... for... for my can TC you can go ahead and go through that process. Scott. So this is kind of the customer experience and this is what he's looking at. I'm not sure how your guys setup is, but right, aardvark service would obviously be your logo again, that's your description of work here's, the pictures or whatever happened.

*--- Quoting ---*

CHRIS

57:00 And then all scots gonna do is he's going to click that approve button in the top right corner for me.

CHRIS

57:08 Couple of cool things happen. Once he does that, I'll go ahead and refresh that. But somebody is going to get email notifications that Scott viewed that quote as well. As... as soon as that gets approved, you can set it up. That somebody will get an email notification that quotes been approved from my screen. You can see it's approved. There will also track the full history. I see Scott approve that quote because po number is a we'll even track the IP address that, Scott me, that quote. From... from there, we can go ahead and create a job from a quote or add that to an existing job. So, you guys know, you'll be out there next month to two PM. We can just fix it on that when we're out there at that PM.

CHRIS

57:48 For, will kind of give you guys a whole bunch of reporting on how you want to see your quotes, right? Who they're assigned to who the salesperson is, when they were created, right? When it expires by, right? So show me all the quotes that we did for the first quarter for the first month this month. What... what have you? We'll also track the status to, right? So show me all quotes that have been approved, cancel all quotes in draft status. Here's. A list of all of the quotes that we have here. And we can also box, send these back out to the customer to, right? So show me all the quotes at the end of the month. So we all quotes customer looked at but chose not to approve it. Let's go ahead and box, send them back out to the customer... to help get that quote approval rate higher. Will also kind of give you guys a whole bunch of search features on deficiency reporting, right? Because we want to tell the stories to the customer. Hey, we were out here.

*--- Deficiencies ---*

CHRIS

58:39 We... we found these five broken things you guys should budget this year, next year, type deals, right? Hey, let's start comparing who's recording the most efficiencies and let's try to get our deficiency reporting up... rewind a little bit because I wanted to get that quote out. We're back on this, bought their job here's, our paperwork here's, the before and after pictures, changing filters out, whatever it needed to be.

*--- Customer engagement (quoting and invoicing) ---*

CHRIS

59:04 And here's our work acknowledgement to, right? So here's what Scott signed off on the customer signed off. But from this standpoint, I'm gonna go ahead and say the offices, right? With this preventative maintenance from here, I can do two things. I can go immediately creating the invoice, but I'm going to complete this job, Scott, I'm going to send you the service link again, all these switches or things that you can toggle on and off, right? And here's, I think one of the questions earlier is... is, how does the customer see that these three of the three, the services were complete, right? So that this is what Scott we'll see, I'll show you. I'll send this to you, Scott. You can see here's this deficiency as well. Yeah, we want to send us all to the customer. Scott, you're my primary contact. I'll send that to you... and what he's looking at guys is basically going to be us very similar email to the quote that Jose, hey, view... view there, your job summary, Chris K, well, was out here to do hi, this preventative maintenance work at, you know, this. Time blah, blah, blah here's. The three services he completed, he'd inspected this, did all of these things here's. Any of the parts and labor that he used, no comments because we left that internal. If we wanted to make it public, that comment would be here of Chris. Did he everything he was suppose to?

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

CHRIS

1:00:16 As well as here's his checklist startup list, install this, whatever that needs to be the work acknowledgement. And then before and after pictures. And by the way, here's this deficiency that was reported. If you haven't gotten a quote, you will in a

minute. Next standpoint from service trade is we're essentially going to go ahead and then create an invoice.

*--- Customer engagement (quoting and invoicing) ---*

CHRIS

1:00:34 And this is where we start to pull our hand out of the equation. And I'll show you kind of the... the new thing that we just launched a couple of months ago on the invoice side of things. But typically.

PHONE CALLER #1

1:00:47 Really?

CHRIS

1:00:48 This is where we would put a drop-down menu that says send a quick... or... or Computerease right? But the new thing that we launched as the invoice links. So if you guys are going to be invoicing out of service trade... your customer will get an email notification similar to the service link. And again, you can choose how you want to show this to the customer. And I'm talking too fast because we're coming up on the hour. But your guys logo, right? We could have line item this out or grand... or grand total or summarized in your customer can click go to service details and then take them back to that service link, right?

*--- Invoicing ---*

CHRIS

1:01:22 As well as your customer then can click pay now and we can go ahead and pay with credit card or pay with AC, H... same concept with the quote in terms of when we send out these invoice links will track the history of it. So we can see when the customers getting the invoice, and when he's looking at the invoice as well?

*--- Invoicing ends ---*

CHRIS

1:01:44 Any questions?

*--- Customer engagement (quoting and invoicing) ---*

PHONE CALLER #1

1:01:56 No, I don't notice. I noticed on the.

PHONE CALLER #1

1:02:04 The, the last email that I received with the work description and all that. There was a zero comments at the bottom. So that was that comment section that the technician could have written a comment?

CHRIS

1:02:15 That's right?

PHONE CALLER #1

1:02:16 Okay.

CHRIS

1:02:17 Yeah. So I... I kept the comments internal. I could have made them. I could have made them.

PHONE CALLER #1

1:02:22 Right.

CHRIS

1:02:24 So, right here, make visible to everyone, we default this off because I want technician comments coming into the office first before the customer season.

PHONE CALLER #1

1:02:32 Right.

CHRIS

1:02:33 If I were to send that service link out, it could have added that comment. I didn't right? So, but you also have the... option of... of if, when I send the service link, I can put in a text box there. Hey, thank you for your business, customer, completed all preventative maintenance programs. What?

PHONE CALLER #1

1:02:51 How do you get this? The guys, so like at the end of the week, can you get... like hours worked report for they real?

--- *Tech time tracking* ---

CHRIS

1:03:04 Yeah. How do you guys do that now?

PHONE CALLER #1

1:03:06 Adp?

CHRIS

1:03:08 Ap, so do they take, I mean, are you doing that by clock events?

PHONE CALLER #1

1:03:12 Yeah, we're... we're... we're right? Like a handwritten backyard?

CHRIS

1:03:17 Yeah. So... a couple of things there, we're... we're redoing our time card aspect that should be done next month. But because we're sourcing, you remember, when I source those labor items out in the mobile app?

PHONE CALLER #1

1:03:32 I think so.

CHRIS

1:03:35 Hang on a second. So, right, we were out here and we source this data is got a one hour of labor item here, right? Chris cables got an hour of labor here because these items are being sourced since you guys are not doing it by clock events. What you do is run a report and this will give me all of my labor items that Chris could well has, and we export this to a spreadsheet.

PHONE CALLER #1

1:03:58 So, but he didn't like that was on the PM and it was a quoted labor amount, right?

PHONE CALLER #1

1:04:08 You guys done, what if we quoted in our, they get it done in 30 minutes? Yeah.

CHRIS

1:04:12 Would still sources labor, you'll still Bill for the full hour, but he'll put in that he was there for half an hour for... for the right job costing side?
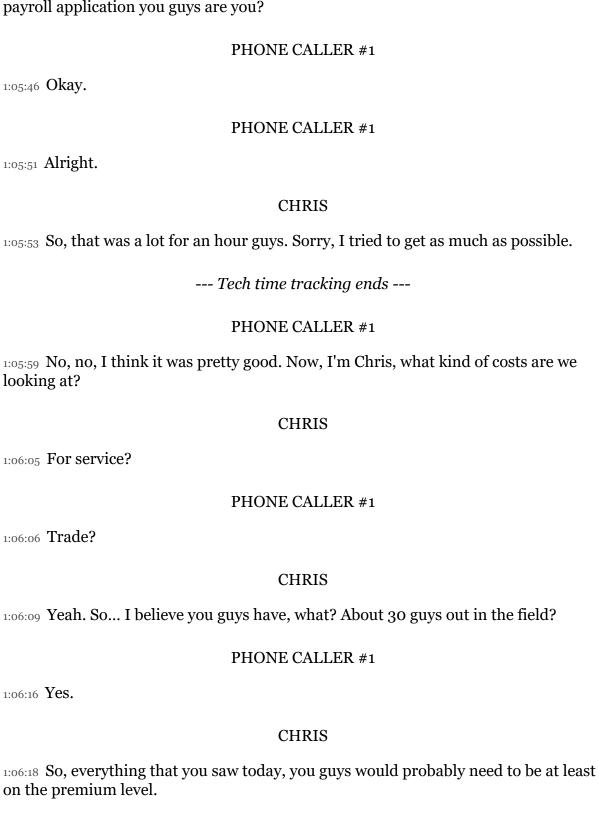
PHONE CALLER #1

1:04:22 Okay.

CHRIS

1:04:22 And then really what I don't know how much time you guys have. I can show you kind of what it looks like. But then we just do an export essentially of... where am I going to have all of the... the items that he source himself being labor items and then you'll have a time card that's gonna kinda say, hey, does this look right? And you would say yes, and then we... we export it or into an excel or CSV file that you would take the adp... because I believe adp can take an excel file... and this is.

PHONE CALLER #1

1:05:00 We're actually, we actually have the ability to keep a time sheet in.

CHRIS

1:05:05 That's right. Okay. That's right. And it's just kinda again, it's how do you guys want to see if you wanna see it by clock events or source by actual items... right here would be the list of if I were to look for Chris cute, well, he might... he might have something, but again, say, hey, we... we... we pay by labor items where we pay by clock events and, right? Maybe a bad example. But the list of jobs that he would have would be here. And then we just total up all of the items and say this is right. And we submit that and that sends that to adp or pay, what does pay tax payroll, whatever payroll application you guys are you?

PHONE CALLER #1

1:05:46 Okay.

PHONE CALLER #1

1:05:51 Alright.

CHRIS

1:05:53 So, that was a lot for an hour guys. Sorry, I tried to get as much as possible.

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

PHONE CALLER #1

1:05:59 No, no, I think it was pretty good. Now, I'm Chris, what kind of costs are we looking at?

CHRIS

1:06:05 For service?

PHONE CALLER #1

1:06:06 Trade?

CHRIS

1:06:09 Yeah. So... I believe you guys have, what? About 30 guys out in the field?

PHONE CALLER #1

1:06:16 Yes.

CHRIS

1:06:18 So, everything that you saw today, you guys would probably need to be at least on the premium level.

*--- Pricing ---*

CHRIS

1:06:24 So, you're looking at 119 dollars a month per technician that we try to Bill annually. That being said, right? Hey, everything's negotiable so, there's some wiggle room there, sales staff, an office staff is free. So, any admin, anybody in the office is that's using the application is... is free? We're not concerned about that. We think the... the value that we bring us to the application, what the technicians are doing?

## PHONE CALLER #1

1:06:52 Okay. So, everything we saw today was in the 119 pack.

## CHRIS

1:06:58 Right. Okay. The big thing. So, the service portal is probably something you guys may be interested in a salesperson assignments.

*--- Recurring maintenance ---*

## CHRIS

1:07:07 I would assume you guys have multiple terms and conditions as well as multiple different pricing structures. I'm assuming, right? That's an...

## PHONE CALLER #1

1:07:16 Yes.

## CHRIS

1:07:19 Typically customers your size have these types of things, right? And the jump to enterprise would get you guys to break out to different geographical regions, which doesn't sound like you guys need multiple brands, recurring contract invoices, right?

*--- Recurring maintenance ends ---*

## CHRIS

1:07:38 So, hey, that may be a question for you guys if you're billing independently of service work being performed. And then the business analytics reporting, right? So that's just a... a BI tool that we have that's tied to.

## PHONE CALLER #1

1:07:57 Yeah. Okay. Think we might be losing you again.

## CHRIS

1:08:03 You still there?

*--- Purchase decision ---*

## PHONE CALLER #1

1:08:05  Really?

CHRIS

1:08:08  I have some terrible internet. I'm sorry, guys.

CHRIS

1:08:17  So... that's... that's pretty much that's pretty much my spiel.

PHONE CALLER #1

1:08:24  Okay. What?

CHRIS

1:08:25  What are your guys thoughts?

PHONE CALLER #1

1:08:27  Liked a lot of the things that we saw. You know, again, we're looking at multiple sources right now and just trying to make a decision on what fits best for us. So definitely will be... definitely, we'll be getting back with you as far as if we have any additional questions or anything. TC, did you have any thoughts? No, I don't think so. I mean, we're kind of, you know, we're... we're we've looked at one. We got, I think we're gonna try to get a couple more in the next week or two and then try to, you know, as a group decide which one we think, you know, maybe narrow... narrow the field a little bit and try to maybe get it.

*--- Purchase decision ends ---*

PHONE CALLER #1

1:09:13  I'm sure we'll have some additional questions, you know, maybe on like for instance, I saw you guys sending invoices that process into Quickbooks. What's that, how do we go back and fix those? I mean, we don't have to do that today, but, you know, maybe kind have a second pass on this thing.

*--- Purchase decision ---*

CHRIS

1:09:32  Yeah. I mean, I tried to, I tried to keep it pretty high level. We slammed a lot in there more. Yeah, normally do. Yeah, right. You guys seem pretty quick and... and I, and we're understanding a lot of this stuff. So I was kinda moving a little bit fast... so there's no doubt I'd probably put more in here in an hour that I may should have. But I kinda say that saying guys probably need to digest a little bit and have some internal, I'm sure they're going to have a bunch of questions that pop ups.

PHONE CALLER #1

1:10:02  Yeah.

CHRIS

1:10:03 Well, I don't verify reach out at the end of March and kinda see where... where we stand.

PHONE CALLER #1

1:10:09 Yeah, that would be great. I think that will give us, yeah, that should give us good amount of time.

CHRIS

1:10:14 Yeah. And then, you know, again, if you guys have any questions, feel free to fire away or if you think it's better just to compile the list of questions and let's set up another Zoom, right? We can kind of focus a little bit more on those specific questions.

*--- Purchase decision ends ---*

PHONE CALLER #1

1:10:29 Okay. Yeah, sounds great. Man.

CHRIS

1:10:32 Alright, cool. We'll do that. Then I'll reach out to you guys at the end of the month and I'll see... see how your evaluation process is going and where service trade stands, okay?

PHONE CALLER #1

1:10:42 Yeah, cool. Thanks, Chris.

CHRIS

1:10:45 Bye bye.

# *The End*