Followup ServiceTrade Demo with HVAC PRECISION SVC INC

Quinton Stallings with HVAC PRECISION SVC INC
Recorded on 3/13/23 via Zoom, 2 hour s 53 min.

Participants

SERVICETRADE

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OTHER

13019219300

Rick

Phone Caller #1

John Wilmoth

Topics

Transcript

--- Call Setup ---

13019219300

0:03 I...

QUINTON

0:04 Hello, everybody.

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0:05 You want me to jump over there?

QUINTON

0:07 Waiting. Hey, Jay, you made it in one piece?

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0:14 I'll tell them how you are constantly beating the, in golf and it's really frustrating.

QUINTON

0:20 Would be the case anymore. It's been a while since we've been out there and I haven't been swinging too good lately. How's everybody's day going so far?

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0:31 Good.

QUINTON

0:39 Yeah, I can hear what you got. I can, I did last year, not this year, but I went the year before. Okay. Yeah, it was awesome and that the weather though this year with the wind, I was pretty much impossible to hit that island green. I think for a lot of those guys.

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0:59 That would have been impossible.

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1:04 All right. So, quiz, I guess you and John had a call the other day.

1:09 Talking about, hey, we're ready to get moving on something else before when you were talking to dust and you're like now we might wanna push something through now, might wanna do it after our busy season, what's change there? Where the urgency come from?

--- Call Setup ends ---

1:25 The program has always been to push 100 Miles an hour to make the determination whether we were in a position in the implementation was such that we could get it done. The learning curve was pretty steep or straight up. So we were able to, you know, and we were able to acclimate quickly. We would potentially that say the goal was to do that unless we found something otherwise, if our data integrity was off was something that was going to make it cumbersome or a challenge for us going into the summer season.

1:56 That is where.

1:58 To make our, hey, in the service department, we can't afford to not be hitting on every calendar going through that, right? So we are still driving forward at 100 percent and are going to make that decision based upon like the outcome of these are going, what is your time frame for implementation? What is your typical training period of time? How have customers in the past? We're looking for feedback from you guys are saying, hey, no, we've had our customers. They've been able to get acclimated and be proficient in whatever that timeframe looks like. What are those options and kind of getting a little feedback? I mean, we're going to be shooting in the dark but we're going to be relying on you going there's. A point where we all have to be realistic. Let's not put ourselves in harm's way.

2:38 Right. Yeah. Yeah. And so you're exactly, right? That's kind of where we come in. We do software implementation every single day. We have a team of project managers that, that's all they do is bring people on the service trade. So we will, if you all want to be aggressive with a timeline on going live, we're happy to match that. However, we're not going to be unrealistic. This is not gonna be a overnight flip of a switch. Hey, let's go live on something typically with a company of your size. We, a lot of.

3:08 Three months.

3:09 For that shooting for two.

3:12 But yeah, we always build in wiggle room because you never know if the data is gonna need some regency during or see somebody's gonna go out sick or somebody's gonna quit. I don't know which one you all is gonna be. I hope it's not... never know and you always wanna make sure you under promise and every that set. So if you want.

3:34 Quickly.

3:35 We certainly can. I've seen companies go live in about three weeks. More than likely, it'll take about two months.

3:47 I think we're right there at that time from where we're making a decision quickly that's in that those parts are in play and we're gonna pursue that. We're gonna continue aggressively until something just says this would be harmful to us, not to.

4:02 For, right, yeah.

4:04 Since you're talking about implementation, what is your process on implementation? Do you take our data and train us off of our own data? Or do you train people off of just generic?

4:17 We make a sandbox account with your own data. Okay? So we'll start by doing data collection. Well, you start with a kickoff meeting with your project manager kinda lay the groundwork for, hey, this is the time frame we wanna try and hit. This is our measuring success, that sort of stuff. And then from there, we'll they'll you'll have usually like a weekly meeting with them. You can ramp it up to do BI weekly if you want to move a little bit quicker and they have the capability to do so. And you'll start by getting them data exports. So here's our customers here's, this here's that we have programs that we can run it through to look for duplicates and look for missing information. And there might be a couple back and forth on that to make sure it's clean before we put it into service trade. But then once we get through that initial hurdle that's where you all can start your office training with your own data, go in and make sure it looks good because that's where the review process really happens in your own service trade account. Hey, let's go in and look at a customer and make sure all the stuff which I think is supposed to be there is actually there. And then once we get that checked off and you all do all the training, then we'll train the technicians. Usually that happens like a week before going live because they just don't need to be concerned with it until they're actually ready to use it. And the application is very simple for the technicians. I really don't need to know that much going into it.

5:40 For training. Do you guys come here or do that?

5:44 We have it as an option. The standard training is virtual. They do modules that you work through. So you can like watch a video right here and then work through what you're doing, what the videos doing right here. And then you take little quizzes as you go along. So you'll have a full dashboard to see who's actually doing it, who's doing it? Well, who needs a kick an ad, that sort of thing.

6:04 You're in trouble, John?

6:08 That we do really recommend is if you want, we offer go live assistance. Somebody will not me because I'm not a training. I'm not trained on how to train really.

6:19 We do have people.

6:21 In actual training team that can fly up here. And I think it's like 3,600 bucks for two days. But the return on that has been very good people.

6:30 People who...

6:31 Have done. It, have really advocated for it because usually they'll come up here the day before you go live. You kinda sit down with your technicians in the morning, answer their questions, work with the office to finalize any thing that you all are uneasy about and then be here today that you go live to run around and put out any fires that pop up or just having somebody who's familiar with the system on day one, you can tackle something in 10 minutes that might take an hour otherwise.

6:59 Right. Do you need anybody, right instruction me?

7:07 We actually have the team for them... that's another thing after this meeting. As you all are thinking about this, go check out our support site. It's just support service trade. Dot com. That is where 95 percent of questions about service trade can be answered processes if you're working in the system and you're like, hey, how do I

update a contact or how do I generate a quote? Everything's in there. It's super easy to use. And our support is it's first class. As far as companies go, we get back to people. I believe the average ticket open and shut is about 15 minutes. Now, there are some that take much longer. There are some that take a whole lot shorter, but we get back to people very quickly and all of our support is based on a rally. So it's not outsource to Bangladesh or anything it's...

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8:03 That...

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8:06 But I can guarantee for.

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8:13 So, I think I and I really have...

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8:16 Out for us for today was to do a bit of a refresher on service trade and all saw about a month and a half ago. So to start with kinda going through dispatching the structure of the data then into dispatching, how we send out a work order, make contracts, that sort of stuff. And I can hop in on the contract stuff if you want.

QUINTON

8:36 Yeah. Yeah.

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8:38 And then go through a typical work order and then talk about how do we deliver on that and get it back to the customer. There. Any things that you can think of that you're like, hey, this is an absolute priority. I know BuildOps probably gave you a checklist of things to ask about. They typically do at least.

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8:58 Actually, we gave them ideas. Well, the grand scheme of things.

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9:05 I heard that they're giving out huge discounts when they hear that we're in the running with things too. So, if anything we'll get you a good discount on.

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9:15 Even buying at their deal.

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9:17 They bite on our just kinda been back and forth real.

9:19 So background.

9:20 On service rate, we were built from the service world and are slowly getting into the small projects. So the three to six months projects, they kinda came from the project world and are now trying to figure out the service world. So there's some shortcomings there on their, usually it's around like assets and recurring services and that sort of stuff tracking all that and making sure that nothing slips through the cracks, but it's kinda coming at the industry from two different sizes, okay? Tell.

9:55 We do. But we don't...

9:58 Currently, right now, we're just focused on the service department. We, we've got, I don't know a background on our organization is we do planets back Construction or under a general contractor for HVAC, have another department for plumbing. And then we have a what I call a retrofit division which is really doing systems. They just separate department that does.

10:18 System replacement and.

10:19 One off installations that aren't through a general contractor. And so right now we're just bringing the service department, okay?

10:28 Requires about 15 percent of our business, the Construction department, and the other part. So now we're fixing the service.

10:38 That's step one. Cool. So as you think about the bigger picture where service never really try to be the software for your Construction department, that's not what we do. However those owner project that is kind of.

10:51 A lot of our...

10:52 Development is going right now. So keeping up with budgets and how you're tracking that with working Progress reporting, that sort of stuff is all starting to get baked into our software and we've rolled out a lot of that over the last six months and

there's more to come this year. So understand that's not the conversation for now. But we do have a lot of...

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11:14 Reports is actually more appealing that way that it's focused only on service because BuildOps has everything. Yeah. And right now, it's not what we're looking for. So.

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11:25 We've been doing this for 10 years. We have a good track record of getting people up and running and doing it efficiently. So, I've already got a couple of people in mind that like you to talk to about, hey, how quickly can we do this and how easy is it to do it? And are these ServiceTrade people full or not?

QUINTON

11:47 Well, I'm ready if you guys are cool. Well, Jay and I like to keep this conversation. So if you have any questions as we go throughout the platform, please feel free to interrupt me and I'll go ahead and share my screen.

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12:02 You have me assigned.

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12:03 To your job?

QUINTON

12:05 I do.

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12:07 Is it in the mechanical account?

QUINTON

12:08 Yeah, yeah, you should be on there.

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12:12 And they can't see us. Did you see us, Quinton?

QUINTON

12:16 Yeah, I can see you guys.

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12:18 Right. I see. Okay.

12:20 Perfect. Perfect.

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12:22 That's right?

QUINTON

12:24 Well, I'll just go through some quick slides here to give you some background about service trade. As Jay was mentioning, we are specifically designed for commercial service contractors. Some of these customers you guys might be familiar with, but we work with companies just like you guys in the HVAC industry doing all commercial work, heavy recurring services and PM agreements and looking to find repair so you can capitalize on that revenue. But our goal is simple. It's to help commercial service contractors be more valuable to their customers and certain help you guys grow your business because that's what a software should do. It shouldn't be an expense that you're constantly having to fit to your business. It should be something that you invest in that helps you guys grow. And we can help you guys do that in three primary ways. So, the first and foremost is going to be the through operational efficiency simply put by streamlining your service operations and consolidating all your customer data into one centralized location. We're going to help you guys get the most out of the current resources that you have today. The second way is by keeping and attracting new customers. So a lot of platforms out there can hanage work or managed work orders, they can schedule and dispatch, but they don't always focus on the customer engagement piece. So service trade is going to help you guys enhance that level of customer service you provide through things like a customer service portal, so somewhere that your customers can log onto your website and they can view their services that are upcoming approve quotes, pay on invoices, all to make that customer experience a little bit better.

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14:08 That we talk about a lot of service trade is, I mean if you're doing your job perfectly, but nothing happens. How do you get a customer to keep paying for nothing? Show them all the little stuff that you fix along the way. So, we have our probably 12 that deficiency documenting repair opportunities to turn into closes, which is really important to drive through revenue. But it's also a great way to just show the customer. Hey, I saw this as a problem, tighten it up, no charge, but save you from this. Would have been downtime in three weeks if I hadn't caught it.

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14:42 Also called auto pay during the pandemic.

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14:56 Everybody in the industry is from.

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14:57 Thinking about acquisitions and everybody's getting bought or buying other people and that's really how you make show the value of your business is that recurring revenue and contract revenue.

15:10 Yeah. Awesome. The last way and perhaps the most significant way that we help our customers grow is through our quoting features. So we make it really easy for your technicians to find additional repair opportunities out in the field. We then are gonna make it really easy for you guys in the office to take those repair opportunities and turn them to appealing quotes. And then even easier for your customers to just say, yep, all that looks good from the picture to the description. They just click approve. It's how our customers right now are seeing on average a 23 point four percent increase in service revenue per technician each year. So, any questions about those slides before we get started with the platform itself?

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15:58 I off handed question. Do you guys do a lot of fire prevention company?

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16:04 Do, yeah.

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16:05 I've seen all this before. Okay? On the customer side, I've seen all of that.

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16:11 Yeah. So we...

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16:12 Ported 10 years ago as part of a company called Don, well, which was firing life safety company because they needed a better way to track their recurring inspections, fill out paperwork and all that. And then about two years after that, well, that company sold to into our cto went off and did their own thing. And then so they were recreated this software. We're selling it to firing life safety contractors. And then about two years into it, some of their contractors like, hey, that the mechanical contracting business where this would work really well too. And so we really found is more of a workflow thing rather than a type of equipment you're working on thing. Anybody who's work, doing work for commercial clients that's recurring work built around contracts and that you're trying to drive pull through revenue from it that's where we're a good fit. And so we found that mechanical and firing life safety. And so really those are the only two industries that we work in.

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17:08 Yeah. I know. I don't know probably 10 or 15 companies across the country that you see guys.

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17:16 I mean.

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17:17 Around here, fire and Virginia rank or company remove customer of ours. Yeah... that you're getting worked on.

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17:26 I worked for a company called Ray was the third party distributor and we via... I mean, I couldn't tell you about.

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17:37 Across the country. So right now, yeah, we got our start.

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17:42 Now, it's about 50 50 on our customer base.

QUINTON

17:47 Sorry?

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17:48 I just have seen that before many times.

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17:50 Approve. Is it? You approve?

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17:54 Yeah, it is. I don't like the pictures I, that's one thing too small.

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18:03 Ready for a...

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18:07 The whole...

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18:08 Day you quick on the, I know, I...

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18:13 I know. I scheduling got cool option.

QUINTON

18:17 Well, we're gonna walkthrough three different views of service trade today. The office view the technician view, but also what your customer would see on their end, we're gonna start out focusing on the office view of service trade. And before we get into how your customers in data is going to be structured, we're gonna take a look

here at the service dashboard. It's basically just a high level overview of your service department. So you can see here just a snapshot of the daily schedule who's whereas they're clocking in and clocking out of their jobs. We can see overdue jobs without appointments. This is one nice way to make sure things aren't slipping through the cracks. So any recurring services, any PMS that might not have gotten scheduled, this is one way to make sure that we're keeping those on the calendar... jobs without appointments do in the next two weeks to see everything that's upcoming. And...

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19:09 That on Justin's notes, you'll have a pretty good way of keeping up with when europeans are do right now. Correct? That's five steps ahead of most people. Everybody still using excel sheet?

QUINTON

19:23 Yeah. And for those PMS that you have set up, are you guys able to run a report to see what's upcoming? Or is it just notify you of when it's due?

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19:35 Two things is going there's. A notification that we've got in a text box that's front and center on our dispatch board. And then two, we have a... we have basically I have a PM board that is showing month by month list of what is due in that particular month with the way the previous one?

QUINTON

19:56 Got it. So you're taking a look at what to do and then putting it on the PM board to schedule out.

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20:03 Is automatically?

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20:04 Generated out of the contracts? Okay, cool. Is that is always there and update if we make a change on a contract or a date, it gets reflected there off of that board. But then we also have some notes that run center to tell us that this contract or this PM was due 15 days ago, so that we know that it's overdue. Yeah. Or if it's even due in the next 30 days?

QUINTON

20:30 Gotcha. Okay. Cool.

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20:33 Do you have a means of capturing that? If we're if you're have a work order that comes in and there is a maintenance that is either overdue or near due? Is there anything to alert one to that fact that?

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20:47 Hey, there is overdue maintenance on this.

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20:49 Putting the service call and this is the status of the main, if you have a maintenance to do as well. So you can combine.

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20:55 Automatically try and combine if there's a quarterly and a semi annual, or if there's you're putting in a service call and there's something else at that location that should probably get done, yeah.

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21:05 Is it because it's overdue or even if it's in, you know, is that a user defined parameter saying something's do within a certain time frame in relationship to the service call being entered?

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21:17 Depends on where you're looking at it. If you're looking at our map based scheduler, it'll show you anything. But then if you're looking at the location, it will have the overview in red. So.

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21:29 Make it a point to show us that that'll be of interest.

QUINTON

21:33 Cool. The next bucket here is past jobs. Be mark complete. This is basically when the technician completes their work order out in the field, it will show up here in the office for you guys to review. Make sure everything looks good on that work order before you invoice it to the customer. And then lastly, a completed jobs be invoice, just a final reminder for all those jobs that we did complete. Let's go ahead and invoice those jobs out?

QUINTON

22:04 Any other questions about the dashboard here?

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22:08 Are those your technicians on the right? That's correct, right? They're better looking than our technician... on the, you know... that's awesome. I... just as far as.

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22:25 Dashboard. And your layout, is any of that user, the user able to modify that in any way shape or form or things?

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22:35 Structure that?

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22:36 Is set now?

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22:37 Is, if you click on the 35 offices up there, you can determine.

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22:42 What you wanna see whether you want to break it down by office, if you want a PM office and a service office, you can break...

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22:48 Things out that way or you can separate it out by job type or service.

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22:53 So, job type is the type of call. And then service line is going to be the type of equipment that they're working on. Now, we do have a lot more recording functionality within ServiceTrade and say, show me all of my jobs with parts that are overdue for delivery, things like that. And then if you find yourself running server reports a couple of times a week, you can just bookmark them in your browser so that you don't have to deal with the filters every single time that you run that. But this is kind of just the basic, hey, let's get in here and get a 30,000 foot view and make sure everybody's on their stuff because if we had 538 jobs overdue we would...

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23:32 Fire.

QUINTON

23:35 Yeah. All right. The next thing we wanna take a look at is how customers and locations are organized in service trade. This is a company page here. So we have the long horn take stake house headquarter page, but we have four different physical locations that we service for them. And each of these physical locations has their own location page that you can click into and view everything for that one site. So for the longhorn horn stake house here in Michigan, you can see the customer contacts here. This can be where you see your services that are due. So we've got some repairs, some one time repairs that we need to get to. This is also where you set up your recurring services, your PMS. So, for instance, this quarterly PM here, yeah, good point, Joe, that's showing that it's overdue right here on that.

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24:36 So then like the one day... for the 20 fifth of July, what does that mean? I mean that that's when it was completed?

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24:44 No, that's when that was suppose to have been done. Okay? So you have the service?

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24:50 All of them, all of the assets are a list of different ways.

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24:54 Yeah, that's correct? So each service is typically tied to an asset so that we can track what is being done per piece of equipment that way either from the office or the field. You can say, alright, show me RT number 17. I wanna look back at what's been done specifically on that rather than the whole option... good sales tool as well. So you can just be like... 14,000 dollars repairing this 20,000 dollar or you, I don't wanna be in the repair business because that's just chaos. You can't really account for it. I'd rather replace it and get you set up.

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25:33 Super helpful there, Quinton, if you click it, will you click into one of the assets and kinda share that to him?

QUINTON

25:39 Yeah. So.

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25:41 So underneath.

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25:42 Asset, this is from the office view.

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25:44 Also see this from the mobile app in the field?

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25:47 But you'll be able to see.

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25:49 Make model serial number. You can have belt sizes and quantities in there. So you can run reports for all right, fill me all the belts I'm gonna need in April for all my PMS and just order those into the.

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26:01 Warehouse involved that sort of thing. And then underneath that, you'll be able to see the job. So there's all the work orders that have been done to it.

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26:09 The services are.

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26:10 Gonna be the.

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26:11 I work that you set up to be associated with that deficiencies that's going to be repair opportunities or just issues that you found whether they're quoted or not. So I can look at that for the entire location or I can look at that per piece of equipment. So if a compressor is going wrong every six months, something else is, I need to take a deeper look at that. You can also do attachments there. So whether it's a picture, a video or a PDF repair manual or a wiring diagram, you can tie certain attachments to that asset. So whenever a technician is working on it, they have access to that. Heard so many stories of people on like condo complex that finish up a PM, and they did it on their competitors and the equipment that their competitors actually.

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27:03 Taking care...

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27:05 Of like a picture of the equipment would make it. So you wouldn't do that. Any questions there before we go back to the location?

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27:16 Yeah. But.

QUINTON

27:19 Cool. So the rest of what's on the location here is a lot so similar to what you just saw on the asset page. So we can see the job history. We can see all the assets that are at this site. So we've got a boiler generator and ice machine, rooftop unit to... we can see all the deficiencies that have been logged here.

--- Pricing ---

QUINTON

27:44 All the quotes that we've ever sent out... any type of custom contract pricing. So this could be mark up rules for different customers for parts or labor... you've got?

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27:59 Location. So if you have a certain pricing contract for all the PM work and then something else for repair work, if that's not covered under the original contract, you can have that and it will separated out automatically by the classification of work order. So, whether it's a repair call or a PM call or whatever the case is there. And then we can also to make those contracts applicable for each location. We have a simple way to just like create a standard contract and then you can just copy it and then make a couple of changes for the individual company or you can do parent child

contracts. So if you want to have all of your individual company or location contracts be children of the main one, then you can just change the main contract and it will subsequently change everything else beneath it. And it depends on how you want to structure it.

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28:53 How many of your clients are under a?

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28:58 We have some 300 or so. I mean, some of those may be, you know, single user with a lot of equipment. Yeah. But that's roughly the number of a firm contracts.

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29:12 I guess from a revenue breakdown, how much your revenue in the service department is coming from?

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29:20 That's a good question.

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29:21 It's about 60,000 a year or, sorry, 60,000 a month.

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29:27 So...

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29:27 Depending on... we have a lot, we have a customer that has multiple locations, but they don't currently have a contract with us. So it's just time and material, but it's a huge client. So that's where...

--- Pricing ends ---

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29:45 They're still tracking all their equipment.

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29:46 Absolutely. Yeah.

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29:48 The application of most of what you're pointing out here sports?

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29:52 Over, right. Yeah. And we do a lot of like end up doing. I don't want to have a contract, but then we end up doing the maintenance anyway, you know, on time material. So.

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30:07 I'm so sorry, I just.

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30:11 When you were saying if you like, if you have a parent company and you're changing something in that parent company because you wanted to go through all of them, I'm thinking of like capital building supply and email address, contact email address changes and that's for all locations, we can make that in the master account and it would just cover all the locations?

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30:31 Correct. Because essentially you're just.

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30:32 Taking...

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30:33 Do you have a...

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30:35 Contacts database, and you're tying them to individual locations... that's like when it comes to our customer portal, we can embed a link into your website where your clients can go to your website and log in with their email address and password to. And then it shows them all the jobs and the quotes and invoices at all of their locations. And that goes based off of the email address and what location it's associated with. So it's one contact across multiple locations.

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31:13 And the credentials be... there is something other than an email address, a lot of the times we have the bigger customers. And the reason why I'm asking because we have a lot of bigger customers who have multiple people within their ap department. So it may go that email may go. Could it be identified or their log in information, credentials be their customer ID number? Great question. That also stays the same throughout the.

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31:47 What would be the harm in just having multiple log INS... for each person?

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31:53 I don't know but I mean, if, who is in charge of that log in information? Like they get locked out of our system or something like that? Is it up to us to have to

reset their information or?

32:08 Like a reset password button? Yeah... I can ask if there's another way to classify it, but I assume that there's not because there's a lot of tracking that we do around quotes and invoices that you don't want some generic, you don't want to go into some generic email address or some generic account that could be multiple people. Because if somebody clicks on it opens it and doesn't approve the quote, you kinda wanna know who it is. I think.

32:38 Okay. I was thinking more aligned on the lines of paying invoices... not accessing.

32:51 That where you want to invoice from, if you want to do without a service trader, if you want, can say, hi.

32:58 All of our current in. Okay?

33:04 Okay. So our main...

33:06 Contracts because the recurring invoices are sent out automatically prior to us doing the service. Okay? Those are done directly out of Sage 50 because they have a recurring invoice function that we.

33:18 Can use.

33:19 All of the time of material invoices for service calls, when we go out to do a maintenance, so the customer knows that we actually perform the service that we've already built them for, comes out of file maker, comes out of our service program. And those are all emailed to the customer. And then there's a couple of customers that haven't given us email addresses yet. So, all of the majority, I would say 95 percent of our invoices are emailed to the customer, but it could be emailed. Like she was saying, it can be emailed to one person just in the accounting department, or it might be emailed to three or four different people. So we kinda have a combination of both. Okay. And are you guys able to email to multiple people?

34:07 Yes, if you want us to take over recurring invoicing, we can, we have that capability on the higher tiers of service trade. Kinda just depends on if you like where it is. There's no point changing it. But if you want it to all kind of have the same look and the same feel. Well, I do have that capability.

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34:27 Because then on top of that, when we have a customer on the phone or somebody's calling... we import an export. So all of the, we don't do any accounting out of file maker, the invoices are emails out of file maker. And then it's imported in Sage. Okay? And then the invoices that come out of Sage, I import in file maker, so that we have a list of what's been billed automatically. So, if it was all in one place would be great. Yeah, it would be so much easier.

13019219300

34:57 We can do that. And then it would be a similar export that's the only way to really talk with Sage 50 is just taking an export of invoices and pushing it into.

13019219300

35:08 Which is fine. Okay.

13019219300

35:09 Yeah. Cool. But then we can have it in that database of what's been paid, what hasn't been paid and what that push from there.

13019219300

35:23 So the payments could be in one place too, like.

13019219300

35:27 Right. It's gonna go into service drink. Yeah.

13019219300

35:32 Then we just export the payment and get what they're saying. He's saying we don't need to, right? Just maintain. Okay?

13019219300

35:40 Yeah, we can. I can ask Tonia, our running integrations like she sold Sage products for like eight her... she's very in.

QUINTON

35:55 She's on standby, TJ near to jump in.

13019219300

35:59 A...

36:00 British company. Yeah, she worked for a line solution, Florida for many years. And then as a CFO, a contractor and a...

36:18 Sorry in, I didn't mean to hijack out their approval.

QUINTON

36:20 No, you're good. Can you guys still hear me? I think the audio is going a little bit. Okay. Perfect. Last thing to wrap up the location page here is just, we can see the comments here at this location. Maybe it's an alarm code to get into a building or, hey, every time we come out here, we need to bring a tall ladder. These comments transfer over to the work orders as you guys create them for this location. So you don't have to remind those technicians or remember to put those on the work order yourselves.

36:47 I can create their own location comments. So if they're out there, the gate code changes, they just type it in, tied to the location and we're good to.

QUINTON

36:59 Right. And then lastly is just the attachment. So this can be really anything that you guys find valuable for this location. Some customers like to have a map of the building of where their assets are located. Maybe it's even a manual on how to operate on a piece of equipment. All of this is gonna be accessible from the field as well.

37:19 And the customer portal?

37:24 Like if a customer.

37:25 That information.

37:27 So, if you are adding a comment or an attachment, you can determine whether or not you want it to be public. Typically, we have that default off, you never know when a technician is gonna be taking a video of a problem and say something ridiculous in default off, so that you can control what gets back to the customer?

37:52 It's a question. If a technician inadvertently erases something. Is there anything that tracks changes and, or two makes data recoverable. So somebody deletes something they maybe shouldn't have a gate code and we wanted to go back and say, okay, Joey deleted gate code three four two.

13019219300

38:16 History of absolutely everything. The data recovery piece is the one I don't know about. We might just show you. Hey, this is what was here. That was not, I have to ask about that.

QUINTON

38:26 That you.

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38:26 Track anything that's done with the time and date sample on the user that is.

QUINTON

38:31 You can also set permissions per user. So if you don't want technicians to have the ability to, you know, delete things as far as like comments and stuff like that. There's different permissions, you can set for them.

QUINTON

38:49 Okay.

QUINTON

38:54 All right. Any other questions before we move on? All right, the next thing we're going to take a look at is the dispatch board. So there's two main ways to schedule and service trade. The first way is on the dispatch board here, it's gonna be more of like a reactive service call. So someone calls into the office. When you send a technician out there on the dispatch board, you've got all your technicians on this left hand side. We like to call them the on the technicians own swimming and you can see all their jobs as they are completing them throughout the day. So Katie down here, if I wanna see what she's doing on this work order, I can click straight into it and view everything that she's done at that site. Change the, what? Okay?

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39:41 Yeah, the question.

QUINTON

39:43 Got it. Got it. And then on the left hand side here is where you can add jobs. So let's just say, you know, a customer calls in as I'm typing that customer's information into service trade. It populates that customer's information. You can select what type of call it's gonna be from a service call to an emergency service call, a P. M, whatever it may be. You can add the technician if you know which tech you wanna put out there. But for right now, let's just say we don't know who can go out there and we're not sure what time they can go out there yet. I'm gonna schedule it for today. We'll

give it a description of the problem. If you know what asset there is to be serviced, you can actually click into the asset section and select that asset based off that customer's location... and then give it a description of what that service will entail once you hit save, it falls into this unassigned category up here to where we can now click and drag that job down to whoever can take it. So it looks like Ben is completely not working at all today. It looks like on drop that job down to Ben's calendar. He's notified that he has a schedule update and he's able to access that work order immediately.

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41:03 So you have three options really there. You can either when you're creating jobs, add a technician and add an appointment time or you can add one or the other or you can add neither. So.

13019219300

41:15 I guess the way Quinton did it, he added an appoint.

13019219300

41:17 On time with no technician that's why I landed in that upper level unassigned. So, if you have a contract with somebody that says, hey, we have to get to you within 12 hours of your call, I would put that on the board. That way. You know, you gotta get to it today. Now, if it's somebody that we're just gonna get you in the next week.

13019219300

41:35 We can't see it's kinda behind.

13019219300

41:37 I head, but there's an available job tab right there. You can click on that, and then you have the different buckets of types of work. So you can go into your service calls and filter them by head or the priority or what's due soonest and go ahead and fill out the rest of the schedule with that. You can look at this by type of call or by time is if I only wanna look at chillers or something like that, I can do.

13019219300

42:04 So... my questions can come into when you're scheduling, like I'm assuming below means that they haven't gone out or like does the stages changed as the all stats?

13019219300

42:23 Blue... corresponds with service call, that green dot in the top right of the call, right there. That means released to the technician. So I can mess around with the schedule a lot tomorrow, and then all at once just release those jobs to the tech, so they don't have the visibility of it until I give them that to them that's right?

13019219300

42:49 You can release them as you want to, or do you have to read all one time?

42:52 You can do one at a time. We're involved and we quit if you scroll down a little bit, go back to, yeah, right here.

43:01 In rail bar I.

43:04 Is for Katie, that's kind of where you'll start to see. All right, that job is.

43:10 Is that URL? What kind of call would that be? I... don't...

QUINTON

43:16 It's prevented maintenance.

43:18 Okay. So, so a service call is blue, friend of maintenance is whatever he had installed in yellow or whatever. You can set whatever color you want. There's my... green in, you said, so when they accept the call, and I know we haven't gotten to what they see yet. But does the color change on the little button when they've accepted or when they started the work?

43:46 So, that is when the office gives them visibility to.

43:50 What happens to start?

43:52 Blue line down here is going to be what happens when you are in route. So.

43:57 Looks like she clocked?

43:58 In and is still driving cool. Okay. She's been driving for an hour in 17 minutes. If she clocked in that she was on site, it would turn, it would have another little kick up and then it would go dark blue. So you can see how long they drive, how long they're on site. When they take a picture, a little camera icon pops up when they fill out check list, a little document icon pops up. Things like that. Cool.

44:20 Do you have a week visual day or you have like a week?

13019219300

44:26 For a month?

13019219300

44:28 Yeah, exactly.

13019219300

44:29 Or set in a day. Now, a lot of people do.

13019219300

44:33 I have two screens and they're working today and tomorrow just pull it up in two different windows and it updates live constantly. Okay? On our map based scheduler, which is really what our clients use for more proactive scheduling. Hey, let's build out a route to go way up towards Baltimore. If somebody's driving up there, we need to visualize what else is out there or if they gotta drive two hours west of here for a service call, what PMS? Can they hit on the way there and back? That's where you can visualize?

13019219300

45:00 Okay. I...

13019219300

45:02 A weekly view. And then on top of that, we have integrations with Google calendar and outlook. So if you want to visualize it there, I have all the data over there all.

13019219300

45:14 And on that monthly calendar that Matthew, can you like throw the calls that you have on there? Yes?

--- *Pricing* ---

13019219300

45:24 That's really what it's designed to do to say, hey, let's get everything due between now and the end of the month. Let's just throw them all up there. And then, yeah. So, well, I guess this is how you would let's take one step back. This is where you would say, all right, show me everything due next month, Mike... and then just do all offices, Quinton take a second to go through our full database. But essentially, what this does is it'll team every location in service trade and find any services due this month. So this is where you would generate all of those to then throw them onto that map.

13019219300

46:05 Can you search from that list? Like, okay, I wanna do all the long ones now.

13019219300

46:11 Top, you can do.

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46:12 Location and generate just the long horn stuff at one time. And then if Quinton scrolls down a little bit on the right hand side, this is where it will try and throw things together. So, there are two services at the same location that fall in the same time frame. It will try and combine those together for you. So if something is do?

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46:33 Sometime in March?

13019219300

46:33 And then something else is, do you on the 30 first? Maybe we just do together on the 30 first?

13019219300

46:38 How big is that window? That monthly window like you said, March first or the maintenance is do at the beginning of the month and something might be do at the end of the month, can it go out a couple of months or maybe like within the same quarter? Again? I know what I'm saying, but if we wanna do March and April, because right now we're teetering towards the end of March, but, you know, maybe we want to pull some annual for, right? Can you do that? Can...

13019219300

47:07 You just run it for?

13019219300

47:09 This month plus two or this month and next month?

--- Pricing ends ---

13019219300

47:12 Okay. I see. Okay. And then can you search this by like what technicians were? Is this possibly also like return like incomplete calls or is it a call?

13019219300

47:23 This would not be a complete all that would be a different place, but you can very easily run that report to see, hey, what?

13019219300

47:32 What were we?

47:34 Completed?

QUINTON

47:44 So, this is awesome. By the way. I feel like J just kind of like leading me through.

13019219300

47:49 The platform.

QUINTON

47:51 But on the map based scheduler here, the, these unassigned jobs or jobs that don't have a day or time or a technician associated with it. So to schedule these out is really simple. You know, these two jobs are right next to each other. So we probably want the same technician going out there to complete those. We can just click and drag those down here to Wednesday.

QUINTON

48:16 Let's... and add a technician. So I'm gonna put Alex on both of these jobs... along with Alex.

13019219300

48:29 Wherever you want, if you want to drop it down there where he's doing it, you can do it there. You can drag them up onto the map and drop them directly on that job.

13019219300

48:38 And you do it? Yeah. And really the way I prefer to.

13019219300

48:44 I get back to the mountain.

13019219300

48:46 If you just click.

13019219300

48:47 The paint levels... and click on the calendar icon, you can also.

13019219300

48:53 Schedule appointments in a more analog way. So I can add an appointment here, select the date and time, and then just add a couple of technicians to... add another appointment?

13019219300

49:12 Can have multiple technicians on multiple appointments across different days, however you can see.

QUINTON

49:25 That makes sense.

13019219300

49:26 And rather than a click and drag person.

QUINTON

49:33 Any questions about the map based scheduler or the dispatch board that we went over? I?

13019219300

49:39 I'm gonna throw a just a little piece.

13019219300

49:41 Of information. And just, most of our operation is not scheduled jobs like you'd find in a residential world where we could, we put a guy on a job and he may be there for an hour. He may be there for six hours. He might be there for three days. We won't know into it gets there. So, a lot of ours is geared towards having just unassigned. And as we learn more about that technician and how his job is going, whether or not we start to plan that he can get to something else that day for, repeatedly. So we're a lot more less structured from a scheduled event standpoint. And I got a lot of these models where we're showing here, we're showing creating schedules and filling show.

13019219300

50:19 Show us.

13019219300

50:19 Kind of I'm sharing that. So maybe in the context, so show it in the format that we would use, which are unassigned work orders that we're moving around as the guys availability changes, yes.

13019219300

50:32 You build out a schedule?

13019219300

50:33 And then just pivot or you use.

13019219300

50:36 Unassigned.

50:38 And we'll map out. We'll start the day where they're at. And then we're just constantly, we, their clearing, we'll pick and give them what their next one's going to be depending upon whether they come off the job or not. So.

--- *Next Steps* ---

50:47 It would be useful to tap of him for us to be able to say, okay, all right. Just like you said, we have to be on site within 12 hours. My question is, can you assign the call priority? So that we know looking at a call right after that, this is a four hour call or this is a 24 hour call?

51:07 Yes, that would be.

51:08 Really helpful for our.

51:10 Case. Well, some cases we do, but some cases we don't like Alan went to go to a PM this morning and turned into a lead checking repair. So I went from what it would have been 30 minutes or 45 minutes potentially into a three hour job with, hey, I found this roll into the continue with the repair.

--- *Next Steps ends* ---

51:28 Then changed our whole outlook for the day because what we had planned to do after that, we're now not doing today at all. You know, it ended up going to Wednesday, yeah.

51:38 So, you hear the dispatch board?

51:40 Typically we, and...

51:42 These... you have one job?

51:45 For the day and then... as they're finishing up, you'll see when they clock out, they're ready for the next job or when they're capturing that customer signature, a

little icon pops up within their clock event and say, hey, yeah, they're about 30.

13019219300

52:01 To be ready for another job, then you can click on your available jobs tab and pull something down for them. And we have service call.

13019219300

52:08 Priority, urgent and emergency. So you can have four different classifications there. And then you can work those priority within each of those. So.

13019219300

52:17 You click on the a to Z filter up at the top.

13019219300

52:22 Those. Yeah. So then you can sort by name which jobs are marked priority. And then just simply by date... that kind. Yeah.

13019219300

52:35 I mean, I think my thoughts were sometimes where you go, you may have assigned a worker to someone and you may just say, if you were looking at, I may drag here's me visually planning out my day or planning out their days where you're setting you're taking that on and dragging blocks, but I'm gonna call it, you're doing the drag and drop. The plan is a constant state of flux. You start off the day with a plan and it's just a question of how many modifications you're gonna make per hour, you know, and because literally it is that fluid. So we want to kind of say you may map out and have this guy scheduled for three or four calls. But if he gets locked down, you're dragging this two over and trying to figure what hanging okay. Well, that takes priority over this. When this down, this other technician is gonna now take care of this call first. We're constantly playing that, you know, the, what's the game one with the cups and hire cups, you?

13019219300

53:26 Yeah, we're constantly playing that game. It's so that's why I say in the context, you know what?
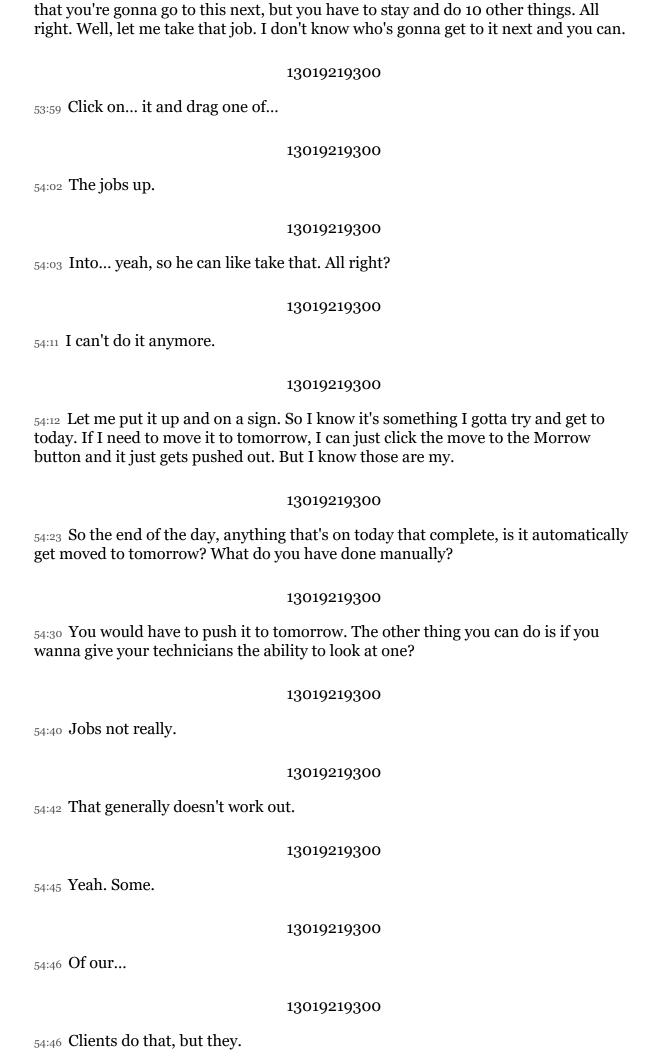
13019219300

53:32 Showing us here in the back of your mind, see kind of how we operate and there may be a different way that you show us on here that I.

13019219300

53:40 There are a couple.

13019219300

53:41 Of nuances there that every company does differently. Some people want to retain all that scheduling in the office. And so if you kinda have a job, hey, I expect

that you're gonna go to this next, but you have to stay and do 10 other things. All right. Well, let me take that job. I don't know who's gonna get to it next and you can.

13019219300

53:59 Click on... it and drag one of...

13019219300

54:02 The jobs up.

13019219300

54:03 Into... yeah, so he can like take that. All right?

13019219300

54:11 I can't do it anymore.

13019219300

54:12 Let me put it up and on a sign. So I know it's something I gotta try and get to today. If I need to move it to tomorrow, I can just click the move to the Morrow button and it just gets pushed out. But I know those are my.

13019219300

54:23 So the end of the day, anything that's on today that complete, is it automatically get moved to tomorrow? What do you have done manually?

13019219300

54:30 You would have to push it to tomorrow. The other thing you can do is if you wanna give your technicians the ability to look at one?

13019219300

54:40 Jobs not really.

13019219300

54:42 That generally doesn't work out.

13019219300

54:45 Yeah. Some.

13019219300

54:46 Of our...

13019219300

54:46 Clients do that, but they.

54:48 I'll start working the list and.

54:50 A job in front of them. Yeah. Okay.

54:54 You have two technicians on. So you said you push the button, say he has to return the next day. Do you know how we always look back? Where was this guy on this day? Does the schedule for today? Remain there with everybody that they did? And then?

55:15 You're essentially creating another appointment for the same for?

55:20 And then the appointment that's right? You combine?

55:25 Yeah. So it looks at the whole, we look at the whole work order and it can combine all the appointments on the one invoice, or if you need to send multiples, you can do that.

55:37 And then I think cutting up what she said. So what happens if I need to add Clint to the one word sake of call, but... I need to pay finishes, but Clint is gonna go back tomorrow. What does it look like if you want to go ahead and schedule, you know, Clint tomorrow on the same adding another appointment for tomorrow.

56:03 So go into the details Clinton. So if you want.
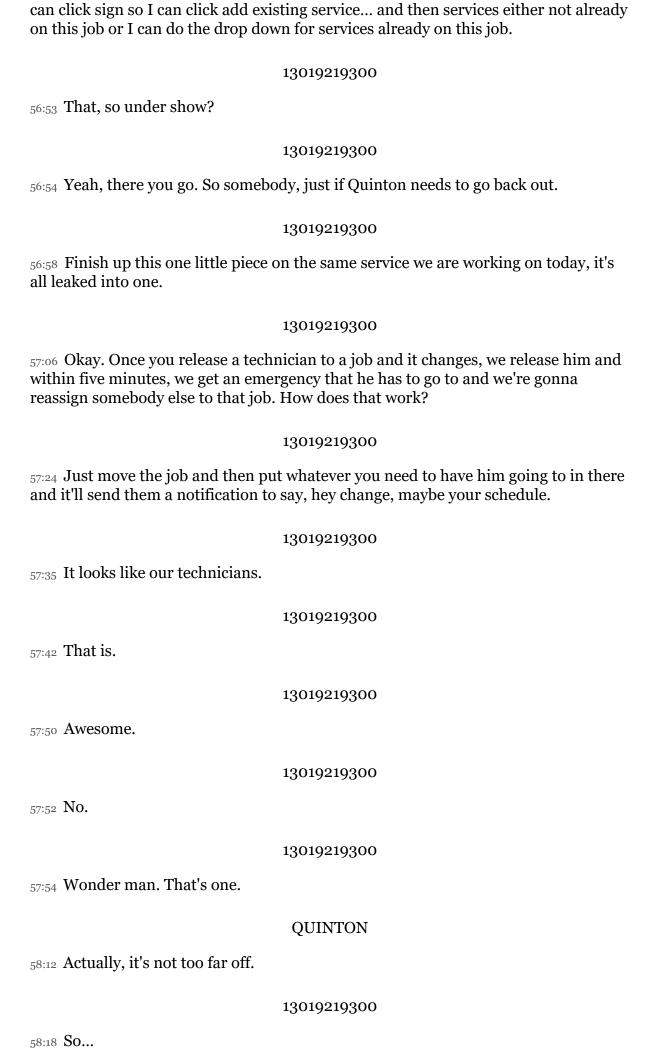
56:08 Add another technician, you could have done it from that page.

56:11 That we were on just, hey, Clint to go on this one as well, if you want to create?

56:16 Another appointment for the same job that's where Quinton was going into this actual job page, and then that's where you click create new appointment. And then you can add a different service or you can say, so add a new appointment or service. And then if I want to just choose something that they've already been working on, I

can click sign so I can click add existing service... and then services either not already on this job or I can do the drop down for services already on this job.

13019219300

56:53 That, so under show?

13019219300

56:54 Yeah, there you go. So somebody, just if Quinton needs to go back out.

13019219300

56:58 Finish up this one little piece on the same service we are working on today, it's all leaked into one.

13019219300

57:06 Okay. Once you release a technician to a job and it changes, we release him and within five minutes, we get an emergency that he has to go to and we're gonna reassign somebody else to that job. How does that work?

13019219300

57:24 Just move the job and then put whatever you need to have him going to in there and it'll send them a notification to say, hey change, maybe your schedule.

13019219300

57:35 It looks like our technicians.

13019219300

57:42 That is.

13019219300

57:50 Awesome.

13019219300

57:52 No.

13019219300

57:54 Wonder man. That's one.

QUINTON

58:12 Actually, it's not too far off.

13019219300

58:18 So...

58:20 Okay.

58:20 All right. So that's a lot on.

58:22 Scheduling. Any other questions there before we go into the mobile app side?

58:29 I keep it going.

QUINTON

58:32 Right. Cool. Can everybody see that that's screen? Yeah. Yep. All right. So, this is the first thing your tech see when they log into their mobile application, it works on apple phones, tablets or androids as well. But I'm gonna click into this work order for today and it's present the text with eight different tiles of information regarding everything that we just went over on that location page. And at the bottom is going to be their clock events. So we keep track of time and service trade in three primary ways. First is going to be there on site time we have in route, which is their travel time, and in job preparation, if that's something you guys want to track. But I'm gonna click into in route and I'm gonna clock in saying, hey, I'm in my truck. I'm on the way to the job site and I wanna notify the customer that we're on the way. So I could say, hey, John. We're gonna be there around two 30... now, once we arrive to that location, I'm gonna clock out of in route. It's gonna ask me if I'd like to clock in on site and I just click. Okay. And it starts tracking my own site time... pretty simple... to give the tech an idea of the services that they're there to do.

59:49 The line I in a dispatch?

59:51 That's correct. Yep.

59:53 You...

QUINTON

59:53 Got it. Yup. On the services tile. They can see the job they're there to perform with a quick description of what that job entails.

1:00:04 There were three different quarterly PMS that they were doing. There would be three different services here. So they can understand, hi, I got one to do on the

east roof, one on the west roof, and one on the RT that's up there as well.

13019219300

1:00:18 Limited number of those. If you.

13019219300

1:00:20 Let's just say they have 20. So we have the PM. Okay. Now, we have clients that are doing 500 on the same work order for mass in industrial facilities. Yeah.

13019219300

1:00:29 Waiting, click on.

13019219300

1:00:31 Thing say you're doing one with 20, and it's gonna take a couple of days, a couple of technicians. You can go ahead and market as completed as you do them. That way everybody else can see it that's on the work order. So you don't...

13019219300

1:00:47 We were just talking.

13019219300

1:00:50 About that.

13019219300

1:00:50 Literally today.

13019219300

1:00:54 Around here. Yeah, yeah, no, we.

13019219300

1:01:00 We're talking about that because you have a large PM that two guys are working together. And then the other guy gets shifted off somewhere else, and the other guy stays well, then he calls in sick the next day. And the other guy's going back, he doesn't know what that other guy.

13019219300

1:01:14 Right. And he can't get a hold of them.

13019219300

1:01:17 He's sick and not answering the phone. So we don't know what he did. So.

13019219300

1:01:21 That's great.

13019219300

1:01:24 That they can just check the units that they're working on.

13019219300

1:01:29 Can I get that from my personal list?

13019219300

1:01:43 Yeah, it kills my six day. We turn around time to.

QUINTON

1:01:53 We've got the comment section here. These are those location comments that we already put on. It looks like JR already said a, is doing a great job out here.

QUINTON

1:02:08 You've got your attachment section. So this can be where they take great picture J... this can be where they take photos, they can scan in documents, take videos, add photos from library or even record an audio message. Contacts are gonna be all the.

13019219300

1:02:27 There's so many times where people like, hey, can you new voice text like, yeah, we can, but how well does that pick up as if they can just go in there and like I can go right into my work order here. Click on attachments recording audio memo and I can say, hey, I'm out at this long or we need this and that we gotta get this done real quick. They want it fixed by the week. Office has everything they need.

13019219300

1:02:56 There is no.

13019219300

1:02:57 There is voice to.

13019219300

1:02:58 Okay. But.

13019219300

1:02:59 I mean, what takes?

13019219300

1:03:01 I have to talk like this?

1:03:03 To get it to.

1:03:04 Work, but for the description of the work that they're doing? Okay?

1:03:11 They're trying to quickly.

1:03:16 Explain something to whoever is quoting something out that's a great way to do it or if they want to hear the horrible noise that's going on up on the.

1:03:24 Take a video.

1:03:25 Attach it to the quote, and then the customer can see that too. I.

1:03:30 We call that the...

1:03:31 Snakes on the roof mentality. Like if I came to you right now, I said there are six takes on your roof. So that folks.

1:03:39 I gave you a.

1:03:40 Video of it.

1:03:41 Hey, here's, six tags on your roof and a quote for 100 dollars for me to get rid of them. You feel like God, yeah, get rid of this.

QUINTON

1:03:51 Cool. Contacts are gonna be all the contacts at that site. You got your paperwork that we'll talk about in a minute. But this could be where your text can fill out a checklist or a maintenance form. Is that something that you guys are doing right now?

1:04:07 Not typically... we would like to.

1:04:11 Adopt a checklist. I think that'll be something that be beneficial.

1:04:15 We do occasionally.

1:04:16 Have customers where we fill out a maintenance sheet, but few and far between. Okay?

1:04:20 But if a customer does have a maintenance sheet, is that something that you can like attach their form to their account? So the technicians now to fill that out?

1:04:31 Absolutely.

1:04:33 A PDF or?

1:04:35 For the most part of billable PDF, we have smart rules that go to them. So I can understand, hey, a quarterly rtupm for cosco, get this for dispatch to it. And those smart rules can also pre fill data. So, if there's certain names, addresses, make and model, serial number of the equipment, things like that are stored in service trade, you can have it map automatically onto that billable PDS. So the technician doesn't have to waste their time doing it. Now. That is kind of the basic way of doing tasking and service trade over the course of the next year. I don't know exactly how it's gonna look, but we are working on improving that more within the core platform. If you want to leverage that down the road, cool rather than doing fill able PS, but that's...

1:05:31 Drink, I just want everyone else is drink. So they...

QUINTON

1:05:41 Right. And then down here at the bottom, you have your job items... which is everything that was already put on the work order for the text. They can also add parts in here themselves as they use them out in the field. And we have our asset that we're working on. So there's that rooftop unit that we can click into view all the service history. We can view all the deficiencies that have been found.

1:06:08 So if I'm a technician that gets called out for some problem, I don't know what it is. Probably the first thing I'm gonna do is go in here and see what has been going.

1:06:17 On...

1:06:17 On, even before I get on site, I can take a look at this and be like I shot.

1:06:22 Have two broke and compress.

1:06:25 I might want to grab an extra compressor before I leave the warehouse just in case for this specific time of unit might be, that problem might not be, but we should have visibility.

QUINTON

1:06:39 We have the attachments here. So this can be where we have that picture. It can be a manual, whatever it may be that's attached to the unit. And then all the asset details.

1:06:53 Do you guys have a function where the guys can take a picture of the manufacturers plate and it'll refill the data? Or do they have to manually put?

1:07:02 So I do actually have that now. Yeah, you are scanning so that can go right through here. And then we have.

1:07:13 Well, and to about two weeks later, but.

1:07:20 We are working at rated?

1:07:22 That capability in a in.

1:07:24 That...

1:07:24 We recently purchased from Northboundary, which is we built software for the corporation, a build his own software and then we acquired it in the fall. And so we're kind of bringing that underneath the service trade umbrella. And so that's where a lot of our tasking improvements are gonna come from. Scanning capabilities are gonna come from that. So it's in his software right now and we're working to.

1:07:51 I combine.

1:07:53 But I don't really have any details on exactly what that's gonna look like. But yes, that is, we have the basics of it in service right now and it's only going to improve over time... and that's where one of the benefits of kind of software nowadays. All cloud base and a subscription model is we're constantly improving. We're constantly making it better and making it more efficient when new cool things come out from apple. We can incorporate them into our software and things like that.

QUINTON

1:08:26 Right. We can also see all the assets at that location. So, if you know, a customer approaches a technician and they want to talk about another piece of equipment, they can search for that unit here and access all that information that they need. But let's say that while we were working on a piece of equipment, we did notice a deficiency that we want to go ahead and log and get.

1:08:52 I say over just a second part.

1:08:55 And labor right now, are you adding parts in their file maker app? How are they documented?

1:09:07 Was used?

1:09:08 On the, on the tablet?

1:09:09 Okay. They're just not taking...

1:09:11 A list, they're just inputting like they used one, two poll 30 a contractor, and then we're going back and looking at purchase orders, match what they bought and

pricing accordingly.

13019219300

1:09:23 And the, so a couple of things there, then you have a list of what should like be pulling from. You, have a database of parts?

13019219300

1:09:35 No, I mean, there's something we've talked around is like basically a minimum stock on each truck as far as make sure you have two of those contactors at, you know, at any given point, but...

13019219300

1:09:46 No, there's no, right?

13019219300

1:09:48 Now, it's just basically what each technician feel they need to stock for what they're doing. And for the most part, they have a good grasp.

13019219300

1:09:57 Intermiss there's some guys that are kinda coming.

13019219300

1:09:59 Around in learning you made the.

13019219300

1:10:02 From residential to commercial. So they're still.

13019219300

1:10:05 What they need and that's where we started talking about minimum stock items, things that we know that he should have Oregon run into this a lot a trip to the supply... of having an inventory.

13019219300

1:10:20 Module, not that we're ever gonna go into the.

13019219300

1:10:23 For I've seen some that are, when I say is cumbersome and keeping your prices updated, right? Versus having a basic, like he's saying a very core, we do want that capability. So I don't know what if you have a module we'd like to kinda see a little bit of that.

13019219300

1:10:39 Yeah, we're not gonna go overboard. It's not at this stage of the game, it has not been.

13019219300

1:10:45 On have one that's like maybe step 10, you know, okay, cool. We do have standard items that the guys tend to forget to put on the invoices and they have standard pricing. So if there was a drop down for that, is that where you're going with this?

13019219300

1:11:00 A very important.

13019219300

1:11:02 Distinction that we just made so service trades, basic core application can keep up with a database parts and all the prices around that. So I can say I use these four parts. You'll automatically have how much it should cost as long as that's update to date on this work order. Then other things that are parts that should be used every time you do this, PM, those can automatically flow into that work order so that they don't get me.

13019219300

1:11:34 I'm talking about like a timing material like we do a compressor change. We're recovering, we're using a vacuum pump. We're using nitrogen. There's standard items that we use every time we do a compressor change and they have standard pricing when they click on those. Is that something that we can build in as a company? Okay?

13019219300

1:11:54 That's a template for the service you're delivering. So, compressor replacement service would have these six standard items that are a part of every single.

13019219300

1:12:03 Okay.

13019219300

1:12:06 Where are you cutting POS right now? I do maker. So, would we, from day one, do we need to replace that or?

13019219300

1:12:17 I would.

13019219300

1:12:18 If it will talk back and forth. So, so if a guy goes out and does get the purchase order, do the parts that he purchased automatically get linked to a work order and automatically appear on the invoice?

1:12:34 Yes. So there are a couple of ways that people do this. We have an inventory management suite called partsledger which was developed internally as a service trade product. But we keep it separately as not everybody needs it. And a lot of the times like you said, people want to get started with service trade, and then nine to 12 months down the road. Once they get the basics under their feet, maybe after the busy season, you roll out like kinda find TUNE things and roll out the inventory management fees. But in the meantime, you'd have to figure out one where you want. Some people are just using the job number and typing that in the po and service trade and letting accounting with the rest of it.

1:13:16 So, I feel like you guys could stop me if I'm wrong, our envision of that would be, I think out of the gate, we would want to use the pulling of purchase orders as long as they're tying into the invoice. And then maybe a year down the road, we might look into creating inventories for trucks. Okay? If that makes sense. Yeah. But like as far as tracking the co and being what it costs, those... cost of goods to the service, we wanna do that now. Okay. How does that work with accounting though... for approving the invoices when they come in? Because then you're gonna be dealing with two?

1:13:56 Yeah. Can you export data from this thing?

1:14:01 We can export data, can Sage for then is the question?

1:14:06 We don't do the plan now anywhere... but.

1:14:16 I just don't see them talking to or if you like... what do you mean?

1:14:24 We don't...

1:14:25 Use our po process is lacking at best... detail. I wouldn't say the po process, anything that I would keep at all. I mean, it's just, it's completely missing everything. So, if you have a better po process, I'll make it work with the accounting. So I wouldn't worry about that. I wouldn't let that be if you have thing, hold on. I'm sure that your system is gonna work much better than.

1:14:58 Okay. My question is, how does the information that the technician buys from the supply house? How is that manually inputted by the technician into the po right now? Artisans call in and then we create the po and we give them the number and we take their inventory list. The.

13019219300

1:15:19 What is it have?

13019219300

1:15:21 I...

13019219300

1:15:21 Mean, I mean, if we could do it automatically, I'm on board.

13019219300

1:15:26 Do you wanna?

13019219300

1:15:26 Give the technicians the capability to generate their PS?

13019219300

1:15:29 We would like to do it on...

13019219300

1:15:34 Individual basis. I think we have some individuals that would be.

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1:15:38 Very trustworthy to do so.

13019219300

1:15:40 Have all the complete information and others that if you have to track them down to get a ticket because they, they'll generate the po and then walk away and not anything. I'm...

13019219300

1:15:49 Even if it was something?

13019219300

1:15:51 Where we can say was snapping a picture of, you know, the ticket as soon as they get their receipt and then snap a picture input it. I think that would be better in the long run at least at a minimum. Yeah.

13019219300

1:16:08 The capability without going into the inventory part, what capability does this have? Track parts? I mean, ideally, in a real world situation, you do pull down the list and pick the part from your own place. And then we kinda do it fast backwards, but does this have the capability to do that in that manner that we track the parts that parts you guys?

<div align="center">13019219300</div>

1:16:36 How many, what?

<div align="center">13019219300</div>

1:16:37 Every job is, everything is?

<div align="center">13019219300</div>

1:16:40 There's not a lot of standard items.

<div align="center">13019219300</div>

1:16:42 Probably 20.

<div align="center">13019219300</div>

1:16:44 The items that you can have on a truck that would apply to a lot of things that we work on. And then outside of that, it's just case.

<div align="center">13019219300</div>

1:16:50 Every motor we replace is different every.

<div align="center">13019219300</div>

1:16:55 Critical. Because if I purchased this me, I'm not going to be able to use it again for another two years, right? I can just sort in the warehouse and call it good.

<div align="center">13019219300</div>

1:17:04 Smith sitting on our office floor.

<div align="center">13019219300</div>

1:17:06 So, let's do it in a couple of ways. Let's start by just adding a part. Okay? And we'll do the standard way and.

<div align="center">13019219300</div>

1:17:13 Show the partsledger.

<div align="center">13019219300</div>

1:17:15 So, if I select a job item up top... this is my list of parts of labor.

<div align="center">13019219300</div>

1:17:21 I can click other and do a one off and it will not, they can just type in bucket of parts.

13019219300

1:17:31 Widget.

13019219300

1:17:32 I can keep up.

13019219300

1:17:33 With the cost, it will hide that from technicians. If you don't want them to see cost, but Quinton has an administrative account, so he sees everything and then the source is a really important piece here. So this is where you can click on it and say, hey, this came off of a truck even if you're not tracking truck inventory, you can source it from a truck. So you can document that consumption.

13019219300

1:17:54 Sorry.

13019219300

1:17:55 And then maybe the end of the...

13019219300

1:17:56 Report for all parts used off of truck two. There's your restop list.

13019219300

1:18:00 Yeah, sweet.

13019219300

1:18:01 Okay.

13019219300

1:18:02 That's a simple way to do it without going full inventory tracking.

13019219300

1:18:06 And then my other question is hypothetically, can we create different warehouses? So, like for example, some of our customers that have... hundreds of filters. Can we create like a warehouse for that customer to have? We have filters on site for that customer for the whole year. And then the guys could pull from that. And then we would know which ones are on site which ones may be.

13019219300

1:18:31 I can just be one of these things here, right? You?

1:18:35 Into one of these things. And if you go down the road for truck tracking inventory or?

1:18:43 Truck.

1:18:43 Inventory, then you can set like minimum and maximum levels and notifications based off of that. So I pages it'll, tell you that's...

1:18:55 So that is tracking it from a truck. If we change that from a.

1:19:00 Else to a vendor, then it'll different set. So I can then select which vendor this is coming from... your list of vendors. I can put a po in there if I have it. And if we're generating the po, then it would automatically all this information would come over from the po generation side. But if you all want to continue to make POS where you are now and then you can just type it in here. So if they call in and say, hey, what's a po for this? You can do that as well. And then I can put a status on it. And this is really important for tracking well, everything. Hey, what parts from today were put in here by technicians that are not yet ordered? Somebody in the office should probably order those or what parts are overdue for delivery? The list of all of those, or what jobs have all parts received to get that, this out and go complete that job, that sort of thing.

1:19:59 So when a part is received that will apply to that part on that job to let us know, say we ordered three parts for a job, two of them are received, but we're still waiting on one that will all show up. Are they like, is that like time stamp in the work order for that job? Okay?

1:20:17 Yeah. So then you can run a report for like all jobs, it partially received parts and understand how many are kinda just sitting there. And then you can drill down into that or like I said, all parts received.

1:20:34 Cool.

1:20:34 So that's the basic way of tracking all of those. If Clinton clicks on open partsledger... you logged into that?

1:20:45 I believe I can log into it. Let me see.

13019219300

1:20:51 Really take the technician into a place where they can click in the po, they type in to the parts that they need. They can generate that po, snap a picture of the ticket. And then in the background, this goes to our po generation inventory side of things. So that's a different website that you'd be looking at from the office, but that's where you can click, okay, yep, issue the po, and then it sends the information over to the vendor. And then when it's received, you receive it in there and it'll automatically update service rate to say, hey, this is here. This is the actual cost of it. And on top of that, they can auto mail, update your database. So anytime you're receiving a widget, three hours later, your sales guys going to quote that same widget, he has the most up to date cost based on your vendors, things like that. I would really recommend if you can kind of do the initial push on service trade, get that figured out and then do this probably in the fall. I see that working best, but I'd say probably 20 to 30 percent of our clients say, no, I want it all at once a time frame that would be putting a swamp all that.

13019219300

1:22:06 Okay. Yeah, I've got this before, no.

13019219300

1:22:10 I'm showing.

13019219300

1:22:10 The service notification. I just didn't look at my phone earlier than when you guys sent it. Yeah. Cool. Okay.

13019219300

1:22:17 All the technicians, we do school picture day and get a nice tool shave that's right?

13019219300

1:22:22 Right. We got photoshop master.

13019219300

1:22:24 Yeah, none of those guys have the code on. One guy has access to figure out which one. Yeah, I don't know.

QUINTON

1:22:34 Uncle David teeders for our.

13019219300

1:22:37 Our technicians. No, this is what I'm talking about. So we have a couple of ways to do this. The mobile.

13019219300

1:22:47 Gives them a couple of different capabilities to stock, look up. Once you implement the full inventory management system, then they can go in and say, all right, I don't have a way to my truck where's the closest one I, if their buddy has it and he's 10 minutes away. He didn't see that well truck number for Jimmy's truck has that I'll call Jimmy and get it from him and then they can transfer from one truck to another if you want that capability. And then with po generation is when they clocked in, it'll automatically pull that job number. They select the supplier.

13019219300

1:23:26 That they're talking to.

13019219300

1:23:32 Yep. So then, so you can create a UI or like a.

13019219300

1:23:40 Item Quinton?

QUINTON

1:23:42 Okay.

QUINTON

1:23:48 Got it. Yeah.

13019219300

1:23:49 So, when you click on add existing, I don't know.

13019219300

1:23:51 Everything that's already on that work order. So you can just say, yes.

13019219300

1:23:56 These are the things I'm buying for.

13019219300

1:23:57 Or...

13019219300

1:23:58 Quarter... and add those to the po... and finalize the P.

13019219300

1:24:09 Some thinking update service rate on the back end.

13019219300

1:24:12 And then there's your camera icon, just snap a picture of the, it from the vendor.

13019219300

1:24:27 A dog?

13019219300

1:24:27 Here in your house, is that I?

QUINTON

1:24:30 Exactly, right. I got three Australian shepherds and the...

13019219300

1:24:37 Got a race track.

13019219300

1:24:38 His back yard.

13019219300

1:24:42 We just created?

13019219300

1:24:45 And then if you go back to the job, you?

13019219300

1:24:47 See, the parts are updated with the, that was generated and they'll say, yes, this has been ordered. Yeah.

13019219300

1:24:54 Per five six, seven from acne?

13019219300

1:24:57 So, the next question is, can you make it like fields require? So I got a technician in the field, good to create a po, but they don't put in X, amount of field. Will it allow them to go to the next step without filling them in?

13019219300

1:25:12 We have based on customer feedback, we have steered away from making gauging workflows. Okay? Because there's always a situation where they have to

move quickly for something or that's more of a training thing really than, hey, let's force them to use it this way because then you might have, you might be adding 15 minutes of work on the end to be able to block out of something when they have to go to an emergency right now.

13019219300

1:25:39 Right.

13019219300

1:25:40 So...

13019219300

1:25:41 Limit them from being able to do what they determine is best. Okay?

13019219300

1:25:49 Any other questions on that?

13019219300

1:25:53 I don't think.

QUINTON

1:25:55 All right. Are we all good? Do we need a break or is everybody still good to keep going?

13019219300

1:26:03 Yeah, I'm good. If you need a break, feel free to take one.

13019219300

1:26:06 I'm okay. I'm good.

QUINTON

1:26:09 I'm good. All right. Up here at the top right hand corner is the deficiency section. So like I was saying, you know, let's just say that we saw something that was wrong. We need to document that repair and get it quoted out by the office.

--- Pricing ---

QUINTON

1:26:24 I'm gonna go ahead and add a deficiency here and say we found a broken compressor. Now, it's gonna give you.

13019219300

1:26:32 Okay. Our clients for every dollar in maintenance revenue, they're getting typically, they're seeing about two dollars and 50 cents in pull through work. So this is where that really starts. Is technicians saying, hey, I was doing this maintenance and this is going to be a problem in the next six months. Let's documented, let's take a picture of it. Let's get it in front of the customer before it is a problem. That way. May maybe they improve it now, maybe they don't but when it does break and we showed it to them three months ago, then they, these people know what they're talking about. And the next time something like that happens, they're gonna start.

13019219300

1:27:05 You're always?

13019219300

1:27:05 Training your customer just listen to us and we'll keep you from having downtime, that sort of thing.

13019219300

1:27:10 Yeah. I saw a lot where for maintenance to maintenance in the fire world the.

13019219300

1:27:20 The world like some fantasy.

13019219300

1:27:26 Like, okay, these two fire sectors were bad and they didn't get that set and it showed how many times it.

13019219300

1:27:36 And then as you start to look at your customer base, people just are proven close, what are you working with them? Hire? The customers are paying the at the bottom 10 percent. Go focus on finding the ones that pay their bills on time and actually spend money with you and all of that. And that's a great way to grow revenue in the business without having to grow technician.

--- Pricing ends ---

QUINTON

1:28:04 All right. So, yeah, there's multiple ways though that your tech can describe these repairs. They can take photos, take a video recording audio message. Let me take a quick picture here of that broken compressor... add that we'll even record an audio message. We'll say this is how bad the compressor is sounding. These are the parts that we need to fix it. We need to get a quote to this customer as soon as possible. They will then walk this, the tech through a few quick steps. The first is being how bad is this problem for now? We're gonna state that it's inoperable. But we can also say, hey, it's deficient, it has some defects or just suggesting that has some minor issues to the customer. We'll say it's inoperable. We're gonna tie it back to the rooftop unit that we are working on. And then.

1:29:00 Service history per piece of.

1:29:02 Right. You on a regular?

1:29:09 I'm sorry, I want you didn't want anything to.

1:29:23 It was getting so warm in here.

1:29:25 I switch it off and get some drinks.

1:29:28 Our wife.

1:29:28 Got me addicted to dig.

QUINTON

1:29:35 And then the last step here is just saying that, hey, this is a new efficiency. We just found it that's all the technician though has to do. You guys are the...

1:29:45 A little toggle switch there in the where it says like the decision see status there's a little toggle that says show to customer. Can you see customers don't see it? We'll go back... you?

QUINTON

1:30:03 I think that's for... the service link that gets into the customer?

1:30:10 Just added.

1:30:11 To whatever... I do.

1:30:18 Probably didn't because I mean, there's...

1:30:20 How many little things are in here? I never saw that. We've been here for three years.

1:30:31 Not that just saying, yeah, you could have saying to if you want.

1:30:40 Very cool. I learn something to do every day.

QUINTON

1:30:42 Awesome. I'll learn that.

1:30:44 Too, don't say that they'll send you a consultant. But as soon as that.

1:30:54 Final demo before being like released to self service trade, our CEO is on there, he asked me some crazy hard question. I think.

1:31:02 You ask me so crazy.

1:31:04 And I was bouncing around and like trying to figure it out without actually clicking too many things. And he was like Jay just click the button. You're not gonna break the system. Just try like it's been designed in a way that's like intuitive and easy enough to use it. Just we...

1:31:18 Right. And you'll...

1:31:20 Probably figure it out. So, yeah, little things like that if you find them and you can just click them and see what they do and see sometimes.

1:31:27 There for.

1:31:30 That's fun.

1:31:33 But as soon as that technician records that deficiency, you guys are actually notified of that deficiency being found and it'll take you directly to a link in service trade where you can schedule that out. So we're gonna pop back here into the office view and we're gonna pull that deficiency up and quote it out to the customer.

13019219300

1:31:54 Come in a couple of different places. They will show up.

13019219300

1:31:57 On the job in which the problem is found, you can also set up email notifications to go to specific people for specific locations or types of work or you can have it all go to a general inbox and multiple people who have multiple destinations for all of that. And there's a report that you can run, hey, show me or repair opportunities found this week that have yet to be quoted out there's. A list of things I need to follow up on a manager.

13019219300

1:32:25 Can you generate an external email... from that? So a deficiency is we have a system that's recommended for replacement that we're gonna do a referral to our install department. And we can that be set up to generate an email like a referral out says, hey, this is a work order. They're not going to be tied into the system. So the email is going to give them the data plate, give them the information on the unit model. Is that kind of thing?

13019219300

1:32:54 Just to give your install department a user on the office side, it doesn't cost you anything and you can have any deficiency or that type of efficiency routed directly to their service rate user, and they can go in, look at the actual asset details on what they would be replacing. The way we, the way we structure our pricing is based on how you all make money is technicians in the feed. Everybody in the office is free.

13019219300

1:33:28 And then at the end, just from prior experience, you guys, can, we can take a front of maintenance, create a report. So the customer that shows all the deficiency. Yep.

13019219300

1:33:41 Yeah, we'll get there in.

13019219300

1:33:42 Just a second, let's...

QUINTON

1:33:43 This out. And then...

1:33:44 Tying up the job that we completed today, we'll show you that customer engagement.

QUINTON

1:33:50 Yeah, yeah.

13019219300

1:33:52 I do a...

13019219300

1:33:57 With all these questions... you didn't know what you're getting yourself into?

13019219300

1:34:07 I...

QUINTON

1:34:07 When you create the quote though, you can create quote templates. So if there's a lot of similar repairs that you guys constantly are creating quotes for, you can add those templates as needed. So we have a compressor replacement template in here, I'm gonna go ahead and add to the quote and it's gonna give us a quote description. And along with the parts that are commonly associated with this type of repair, when those are added, you can adjust these as needed so we can adjust the quote description. We can adjust the parts that are going to be needed as well. And then service trade gives you a gross margin down here at the bottom on how much we're actually making on this job.

13019219300

1:34:46 Things.

13019219300

1:34:47 I wanna know there.

13019219300

1:34:48 Don't.

13019219300

1:34:49 Back Quinton, but on the previous screen before you generate a quote from that deficiency, there are a couple of things there, one is with the attachments which followed us over a two is a related deficiencies tab. So before you even build a quote for it in as a tab there to say, alright, what other issues have been found on our number seven, you can quickly see that and see. All right. Well, if it's another bad compressor, clearly, it's not the compressor. We need to actually figure out what the problem is before we send just another quote to our client. In here is you?

1:35:23 See right here, it's got quote and you scroll back now to the service. Yeah. So it's got repair quote.

1:35:30 And efficiency number. The quote is going to be a separate entity from the deficiency. So that when that quote gets approved, turned into a job and then ultimately complete it, then I'll go back and mark that deficiency as fixed. So you have the whole story documented of when it was found, when it was fixed, all of that.

1:35:49 If you're sending a quote to a customer and say there's multiple repairs, there's three different units. One need, one needs a motor, one needs a compensate pump and one needs a faster and it needs to all go on. One quote is, can you add multiple deficiencies to the same proposal?

1:36:08 Another deficiency yep?

1:36:16 New service or if you want to pull from the bank of the existing deficiency and you can click on select multiple deficiencies, so you can do one right there or quit in the top, right? Click on, select multiple deficiencies, I can select all for that one.

1:36:31 Perfect. Floyd.

1:36:33 Pretty cool.

1:36:40 Cool. And with that, like we kinda have a proposal when we have multiple deficiencies, or you can just in the proposal, you can just type a proposal, correct? Okay.

1:36:53 You can have multiple quote templates. So if you just have parts on labor for these four different kinds of repairs, add the four different templates, and it will throw those four different sections on.

1:37:05 And then let's say our customer says, I wanna fix the compressor on this or, but I don't want to fix that one. Can they pick which ones they want?

1:37:17 They won't be able to slice and dice within there. So once we send the quote, you'll see there's either approve or request changing. Okay? So you can send multiple quotes if that's the case or you can try for the whole thing. And if they say request changes, and, hey, I just want to do this great, well, send it back to you. We found that like good, better, best sort of mentality is awfully residential and none of our customers really wanted it.

1:37:44 Yeah. I just am thinking like for example, our guys could go out and do a PM on 20 pieces of equipment and our customer could come back and say, I wanna fix or one and three, but six is 20 years old. I don't wanna fix that one this time. We're gonna, but we're gonna do one and three. Yeah.

1:38:04 Cool. You can adjust what you want your customer to or not to see from an attachment standpoint. So here's all the pictures that came from those deficiencies that we added to the quote. So we can click these on or off of ones that we want to show or one, we want to leave off same thing with the audio messages here. And it looks like there's a video as well. So let's turn that audio message off. Maybe there's some things that the texts are saying out in the field. We don't want the customer to hear any of that and we can.

1:38:33 We can have the, I don't want.

1:38:36 And John, I'm gonna go ahead and send this out to you if you can, if you could pull the quote up and approve it for us? I wanna give you guys all an idea of what that quote looks like from the customers perspective.

1:38:53 We have a lot of notifications setup around this that you can control to say, sorry, when John opens the quote, do I want to get an email telling me that maybe not, if it's a really big quote? Yeah, I want that email because I just happen to call right? When he opens in, hey have any questions?

1:39:12 Does it track? So like let's say, John first one. So I know you can hit, you can hit accept but like it, does it track? Because this is an email with a link, correct?

1:39:28 That's right? It tracks a lot about it. Okay?

1:39:35 Wanna know it was sent, it was received, it was open and read, well, my... respond back to the email instead of the EPA.

13019219300

1:39:49 Mode... I just replied to the email. Then... it goes, it sends the email to the send an email to the user that it's trying to go to... but it's not.

13019219300

1:40:11 It, it comes.

13019219300

1:40:17 A little bit funky the way, come back, but it does come back to your.

13019219300

1:40:21 And does it track in service responded to email?

13019219300

1:40:26 No... basically with.

13019219300

1:40:32 Request changes. Yeah, that is all track.

QUINTON

1:40:35 Yeah, like it just showed us now that John just viewed that quote from the quote history on.

13019219300

1:40:42 Your idea.

13019219300

1:40:45 That was...

13019219300

1:40:46 A safety side because there's a lot of liability and risk what we're putting on our system and that our clients are trying to get off of their that like, hey, we put out a deficiency in your kitchen burned down because you didn't want to get your hood cleaned. Sorry, man.

13019219300

1:41:01 Right. Yeah, that's perfect.

QUINTON

1:41:05 So, that quote that John is looking at, it's, gonna have your guys company logo at the top left hand corner. You'll have a description of the work services to can be completed, parts, the deficiencies. Yup.

13019219300

1:41:20 Brand total. Only you can do, I like summarize the line item type. So it's like parts labor other, that sort of thing, but you can control that. And that can also be defaulted based on contract rules. So certain customers require certain pricing layouts. You can have all that?

13019219300

1:41:37 Can you show... hourly rates and how much like we have a travel charge and a full star charge. Can all of that be broken out differently for different?

13019219300

1:41:53 It all depends on how you put it in a description for?

13019219300

1:41:57 And...

QUINTON

1:41:58 Go ahead.

13019219300

1:42:00 Like we want to add a few for, to every call we wanna add a miscellaneous start to every, can you set that up? Yeah.

13019219300

1:42:13 They have your files to show you all the good stuff going on.

13019219300

1:42:16 What was not the picture you?

13019219300

1:42:20 So, what I would end up getting on the fire side was I would get the efficiency report and sometimes they would just send me like a PDF, not the actual like file link. You get a PDF with this little tiny picture. And at that point, you can't make it bigger and like what do me? Any good? I'm happy to like. Can you give me the actual picture? Because that doesn't tell me so that's where you so like. But I can see, I mean, with the size of it, yeah.

QUINTON

1:42:51 I'm scared to view this video. I don't know what video this is.

1:42:58 Come on, come on.

QUINTON

1:43:08 That's not one that I put on there. I had no idea what that could be.

13019219300

1:43:14 Yeah. But so if they are in.

13019219300

1:43:17 Pictures, the way they're intended to be viewed rather than in front of PDF, then you can click on it and it comes up and it's actually a good crisp, high quality. So.

QUINTON

1:43:26 Yep. And then it's your customers are assuming it's your own terms and conditions down here at the bottom. Of course, it's that approve button. Now that the customer can click into enter a po if they have one and then agree to your terms and conditions. But they can also request a change. So if there's something that they want removed or edited on the quote, they can request that change and then you guys are notified in the office.

13019219300

1:43:52 Things there, on the terms conditions, you have multiple terms, conditions that can be applied based on contract rules that you have.

13019219300

1:43:59 With and.

13019219300

1:44:00 On the approved button, it always gives you the option to type in a po if you want to. You can make that required for approval. I'll have to go chasing that down later.

13019219300

1:44:13 Have a whole lot of customers that require because.

13019219300

1:44:16 If you set that up in your customer based on approvals, the require, would that condition or that requirement transfer into every quote of saying, if that customer is approving, if they have to issue the, so when you...

13019219300

1:44:29 The quote there's a toggle that says require a po for this to be approved, it's not something that's done involve.

QUINTON

1:44:42 So, what are you guys overall thoughts about the quoting process?

13019219300

1:44:49 It's pretty straightforward. Yeah, yeah, the there, yeah.

13019219300

1:44:53 As revenue generation tool for our clients and ease of use kinda speaks for itself but then also just the visibility you have around what it is you're actually getting?

13019219300

1:45:04 Gives us more opportunities for the technicians to provide additional information because there, I got stuff like I'm just taking a total guess at exactly what they need because I got this much information and then they, you know, they don't remember what they saw and.

13019219300

1:45:20 How are they getting that?

13019219300

1:45:21 Information to you right now?

13019219300

1:45:23 So right now, it's dependent.

13019219300

1:45:24 On what they would type into the work description, which is probably 90 percent of what it is. And then we rely on, they'll send email with pictures, but we find that.

13019219300

1:45:34 I'd love for it to be attached. We always.

13019219300

1:45:37 Do you have the email that's Sam?

13019219300

1:45:39 That's what?

1:45:44 An ad, that problem with that service email that I've been saying, I've hated since the day we.

1:45:51 So back to really.

1:45:54 I mean, well, because we have six people viewing this email and if it doesn't show as new, you don't know if somebody dealt with it and the flags weren't working. So I just, you know, and then you tend to miss something.

1:46:10 Many case where they're texting and you'll get an abundance. This is my in the heat of the throw of battles where you're trying to keep up with the phones they're sending in text, not identifying what unit it applies to. So all of a sudden, now, you have these random different photos in there and you're trying to identify which work order this is associated with, on which job?

1:46:31 I'm looking at the background of the picture or trying to.

1:46:35 That, that's what say this eliminates. And that was just, I mean, we know fundamentally ours was, you know, a poor designer poor, you know, say the way we're operating, we're getting by. So this streamlines a lot of.

1:46:48 And on top of that, this also gives you the reporting capabilities to make sure nothing is slipping through the cracks there. Because I think you'll be surprised how many times technicians we're probably writing stuff down just like need to belts or something random like that. It's deep in the notes of the work order that nobody ever really saw and that's just money left on the table.

1:47:11 Correct. Yes, it happens to us.

1:47:16 Happens everybody.

1:47:17 So, one of the questions I have is, do you guys integrate with any of the third party service channel, core, ego track any of those?

1:47:27 Service channel? A couple of our clients have built on integration to nobody else is playing nice.

1:47:34 Okay.

1:47:37 If they'll allow it, we'll integrate with anybody but the channel. Yeah.

1:47:45 And then as far as like we have an issue in the heat of the summer, something happens and our working, who do we call? How quickly does it get resolved? All that kind of stuff?

1:48:01 So, when you call our support team, like I said, they're all based on how quickly does it get resolved a problem?

1:48:12 I just don't want to be on the 24 hour wait list of like we're number 69 on the health desk, fly, you get what I'm saying?

1:48:20 Yeah, they get back to people very quickly... and even if it's a, if it's a little bug or something that's gonna take some engineering to really fix, they'll work really hard to find a quick work around that will get you in the meantime because yeah, sometimes we have like a little thing that takes two weeks to figure out, but we figure out a way around it in the meantime that's gonna be anybody's gonna run into that.

1:48:47 Cool. And then my next question is let's say we decide that we want you to track our email. Can we go to you with development request or is it what you get is what you get?

1:48:59 You can, there's a couple of ways.

1:49:00 You can do that. We have a team that does fully custom development. So if you wanna build something off the side of service trade or maybe do custom as you want to track certain specific information about equipment, that sort of stuff. We can do that on a one off basis. We also do if it's fully live to customer yet. So we're in the process of rolling out a new... the software that's designed for feature requests like

it's real cool. It's kinda like read it where you can update and download things. So across the entire customer base, it's like you could go in and see what every other customers requesting. And then if you like it, you just update. And so then you can we'll prioritize that based on how many people want the specific features.

13019219300

1:49:51 I mean, I've used that function for another software.

13019219300

1:49:54 Okay. Not for that like two weeks ago.

13019219300

1:50:01 The functionality.

13019219300

1:50:03 Drill, I don't know if I got the answer if something is wrong and we're in the middle of the heat of the summer and we call, do we get, do we get put in a queue or do we get a human being?

13019219300

1:50:15 If someone is available, yeah, nine times out of 10, you'll get a human being now, if everybody if like on web services goes down, which doesn't really happen and everybody's calling all at once. I can't guarantee, hey.

13019219300

1:50:29 I know. But if we're having a program issue, they have something fixed. I mean... for example, Sage used to have you called and you got a person, no matter what now you call and you get like a three day turnaround, you know?

13019219300

1:50:44 Yeah, I've dealt with those scenarios where it's been in the heat of the summer, our whole system just crashed and I have guys sitting out in the field and I can't send them to a call, right? Scenario where like I need to be able to call, I need to be able to get on the phone and someone resets our button somewhere. You know what I mean? Yeah, we have.

13019219300

1:51:01 We have a phone you can call, you can email.

13019219300

1:51:04 From ServiceTrade.

13019219300

1:51:05 There's a little support button right there, which Quinton can hit and that pulls up a chat box. It will run through and suggest an article if there are.

13019219300

1:51:17 Hey, char, are you talking to a person? The first?

13019219300

1:51:21 Is, is an AI that will send you to a support article within service trade, but if that doesn't work it.

QUINTON

1:51:29 You also have a dedicated account manager?

13019219300

1:51:33 I sit enough. I was using.

13019219300

1:51:40 What you?

13019219300

1:51:42 I...

QUINTON

1:51:42 Was saying, you guys also have a dedicated account manager too. So, if it is one of those really rare cases where maybe you can't get a hold of somebody from live support, you call your account manager, and then I'm sure they can help you with whatever you guys are experiencing.

13019219300

1:51:55 Much lay down the law in the office to be like got, I'm responsible for this person. Why is this should not happen?

13019219300

1:52:01 Yeah. Are there ours for support or?

13019219300

1:52:05 On the biggest hold of that you have in your count that?

13019219300

1:52:11 So, your telephone support for those numbers? Is that 24 seven or are they, or what hours are they?

13019219300

1:52:17 The telephone support? Is... there, is somebody?

13019219300

1:52:21 At all hours of the day, that is on call. Now, they... like there's a lot more support during business hours. I don't know if they answer the phone at two am every single night, but they do have like alarm set to say, hey, this is a serious issue. We need to get all the engineers up and take care of that sort of thing.

13019219300

1:52:43 What are the normal hours?

13019219300

1:52:45 I think it's 10 am to like eight or nine PM all the way.

13019219300

1:52:53 And then my next question is so like your main setup is you create a work order, you go and sign appointment, and then you could have multiple appointments. Does all of the information transfer from like appointment to the.

13019219300

1:53:10 Work order and vice.

13019219300

1:53:11 Versa. So like I asked this question because software I used to use is very similar to how you got their setup. Okay? And we would create a work order. And then appointment number one technician would put a note. You had to go into that point to read their work or then appointment number two would be created. But the notes from appointment number one did good point number two. So then you would have to like copy and paste them and let me tell you it was awful. Yeah.

13019219300

1:53:36 So you can do it a couple of different.

13019219300

1:53:38 Ways. If you want to put notes in for the whole, there's multiple appointments, then there's notes down here, that can be applied to the entire work order. If there are... pictures that are only applicable or notes that are only applicable to one of the services or one of the appointment, then you can put them just under that, so you can put them in.

13019219300

1:54:00 Okay. And then just like you could put my number three is note from one and two transfer to.

13019219300

1:54:06 Number three. So the number three, yes, it's all the same work order, yeah.

13019219300

1:54:12 See what I used to have happen is number one would have notes. Number two would have a whole set different notes. Number three would have a whole separate notes. And so you could number three and they would have no idea what number one and two did, and that was pain.

13019219300

1:54:24 Yeah. So for us, there's a very strict hierarchy of work order. And then appointments. And so the notes are on the work order. It's gonna be there the whole way through.

13019219300

1:54:33 Perfect. Okay.

QUINTON

1:54:38 So...

13019219300

1:54:38 Here in, has got a couple of new buttons that have appeared.

13019219300

1:54:41 Right hand side to create a new job from this quote?

13019219300

1:54:44 Or added to an existing job. If I'm gonna be out there for something next week anyway, and I can knock out this repair. Well in there. I can just add it to that job. I'll give you. We have a lot of open jobs at that location then.

13019219300

1:55:01 We kinda touch on the.

13019219300

1:55:02 History a little bit, which is great for kind of seeing when things are viewed but then quit if you go to the quote reporting page, the great sales tool as well. So.

13019219300

1:55:12 Quinton can run a report to say, all right, show me everything that expires at the end of this month.

13019219300

1:55:19 Has been submitted to the customer and you by the customer but not yet approved. It's like you service email if it's open, I'm not going back to it that's where I got the phone call and ran off and didn't something else.

13019219300

1:55:32 I think I'll find all of those quotes. Do you mind running that?

13019219300

1:55:37 Yeah.

QUINTON

1:55:38 Yeah. So you wanna run? I'll just show him the status.

13019219300

1:55:40 Well, I...

13019219300

1:55:43 On it. So that.

13019219300

1:55:44 The...

QUINTON

1:55:46 Yeah. Where is that reset button? Now? There it is. Thank you. Thank you.

13019219300

1:55:52 Expire by the...

13019219300

1:55:53 End of the month... before.

QUINTON

1:55:59 Yeah. And then...

13019219300

1:56:02 Not at status of submitted, and... this will show me all the quotes that are out there.

13019219300

1:56:13 That...

13019219300

1:56:13 Looked at by the…

13019219300

1:56:14 Customer, but not yet approved. And then I can just bulk select all up top… and resend those to the customer in just to get them back at the top of their inbox ready. That takes quote a follow up and it's amazing how often it takes two or three times to, you know, quote before they're like shoot, go ahead and do this.

13019219300

1:56:39 Customers a call back and they're calling the same complaint.

13019219300

1:56:44 I'll resend that to you right now. You can just type it in and click resend to.

13019219300

1:56:53 Get the same click back out there. And it'll have all the history on it. Like when it was originally sent, they can kinda sit and be in the pain.

13019219300

1:57:02 Well, it's even worse. It's her boss gives her an order to tell her to release us and she's still doesn't…

13019219300

1:57:07 Right. I love the ones where they have like a couple of different units and they played the service call and they call it a different area of building and you go out and it's the proposal that you sent the week before. So you send them a Bill for the service call that they placed. And then they don't want to pay the Bill because we didn't do anything you called us out there to look at another area. Not our fault. You didn't…

13019219300

1:57:36 Results?

QUINTON

1:57:44 All right.

13019219300

1:57:45 On around quotes, that sorta thing?

13019219300

1:57:47 We go and…

13019219300

1:57:50 Plan that you?

1:57:52 I think that.

QUINTON

1:57:57 Cool. Awesome. Well, I'm gonna go back to that work order here and we're gonna go ahead and I'm gonna clock out real quick of that job back out in the field. So, it's gonna say, have you completed your services today? I'll check off that I did, are you doing this visit? Yes. So, I'm finished clocking out... now back in the office again, that job just got switched to completed... here is.

13019219300

1:58:31 On the field, which is where we capture an onsite customer signature. And then it flattens kind of like a post work summary into a PDF and can automatically send it to the do that real quick.

QUINTON

1:58:42 Cool. We've got our parts here. These are the parts that we had purchased from our vendor and we can see that they've been received. We've got our clock events for how long we were traveling, how long we were working on site, and our total time. It also shows where your text are when they were clocking in and clocking out of their jobs. So, this little triangle down here is saying, hey, caution, Jay said that he was working on site but he was actually 507 Miles away from that job site. So that's a conversation we have a...

13019219300

1:59:17 40 Miles away... as you click on that. So we'll do a GPS.

13019219300

1:59:23 Anytime talk. It is done.

13019219300

1:59:25 Whether it's in route onsite or job prep. And if...

13019219300

1:59:28 He clicks on that, it takes you right into Google maps to show.

13019219300

1:59:31 Cool.

13019219300

1:59:32 The, so whether or not they're at the hip joint or at the...

13019219300

1:59:34 Exactly.

13019219300

1:59:36 I McDonald scaring out a couple more cheese versus.

QUINTON

1:59:41 And then down here at the bottom, we've got our comments... here's. The comment from they posted po, from acne, we have our attachments there's. Jays pictures his audio message, and when he completed that work acknowledgement, it's gonna show up here as well. Let's see if it came through.

QUINTON

2:00:20 Yes, it did. So here's the signature that Jay just captured out in the field.

QUINTON

2:00:31 This...

13019219300

2:00:31 Is kind of a replacement for the old pink slot that you would leave, replicate paperwork?

13019219300

2:00:37 Idea. Yeah.

13019219300

2:00:42 I'm assisting not.

QUINTON

2:00:45 Gotcha. And when it's ready to be invoice to the customer, we can click on that complete job button saying this all looks good. We're ready to create the invoice. It's going to give you a section here to adjust parts and your cost as needed... and now it's ready to finalize that invoice and send it to the customer.

QUINTON

2:01:16 All right. So, right off the bat, you can see the gross margin here. Not the best. So let's go ahead and adjust that real quick.

13019219300

2:01:24 Acceptable...

QUINTON

2:01:30 That's a little bit better. We can see now that the gross mart has been changed to about 47 percent. We can send this invoice out to our customer. And this is what

the invoice would look like. So, again, it will have your guys, this company logo again. But instead of having that green pay now or in green approve button, there's going to be a green pay now button where the customer can come in, they can click on that pay. Now, they can pay with a credit card or they can pay with an AC H.

2:02:00 Can create a lot of rules around that. So only certain clients have the capability to pay now. And hey, if it's over 5,000 dollars, I don't want to accept a credit card for them. The fee is going to be too much. I'll only accept AC H for that sort of thing.

2:02:15 Just save now. Yeah.

2:02:19 800 dollar.

2:02:20 Invoice. Just see it. I don't want to think about.

2:02:22 That's where you put a comma after the part, now... an exclamation, point.

QUINTON

2:02:29 And that's where that service details section comes into play too. You know, a lot of times the person that's capturing that signature on site is not always the person that's paying on that invoice. So that service details section is where they can get a full job summary of the technician that was there. The services that they completed here's, all the files that we want to show them with those signature pictures, and then even alerts saying, hey, we also found a broken compressor. Be on the lookout for that quote.

2:02:55 And so that's where the value of invoicing out of service trade is all this detail is embedded into that invoice. But then you can also send this separate from the invoice. So send this as soon as the job is completed. And then you can go back and send the invoice in a little bit or maybe the next day or two days later, they've already seen everything that you've done. So they understand this is good. We're trying to do, we call marketing impressions per service. Typically, it's all negative.

2:03:22 Hey, we have a problem.

2:03:25 Technician comes out, takes care of it. Hey, we want money, but if we have the in route notification and one of these notification saying, hey, look at what we did

today. Look at what we save you from that sort of stuff. It's more positive engagement. So, it does come down to pay the Bill. We found that it really does pull in Ar and our clients that when we roll out our invoicing, our clients like adopted, it pulled in their Ar by an average of 11 days, which was, we were not expecting that.

13019219300

2:03:55 I noticed when I started emailing the maintenance contract at Sage and that link was on there that we didn't even know, was there... people are calling clicking on the link and they won't do anything. They wanna pay them as soon as they get them because they don't want to forget about them. So, I think that definitely increase. So, I think this would be great because I have customers calling all the time saying, hey, how do I pay?

13019219300

2:04:21 A... lot. Yeah. So maybe just click, yes, or?

13019219300

2:04:27 Invoicing out here even better. Yeah, we...

13019219300

2:04:33 One thing we did not.

13019219300

2:04:35 Touch on the would be contract.

13019219300

2:04:37 Do you mind going to?

13019219300

2:04:39 Ashley quit? Can you go back to the dispatch board so we can see what the, what it?

QUINTON

2:04:47 Yes, yes, great. Call out. That's what the, so this is the job that I did today. It has that check mark that it's completed. And if you click into it, you can see that I recorded an audio message. I found a deficiency I made a comment on here. So there's a lot that went on there. We can click into that detail section and it brings you straight to that work order, see to see all that information in real time.

13019219300

2:05:15 Yeah, yeah, I...

13019219300

2:05:17 You see the...

2:05:18 I'll have different notches online, but the same same idea.

QUINTON

2:05:23 Jay here, I was gonna say you're not in this office, Jay?

13019219300

2:05:27 Can there?

QUINTON

2:05:32 So that's jays, right?

13019219300

2:05:33 I think you are.

13019219300

2:05:36 That are job over?

13019219300

2:05:37 On the left. And then, you know, how you can drag it out.

QUINTON

2:05:41 Yeah.

13019219300

2:05:42 Somebody wait too long, just drag out the job and it'll extend.

13019219300

2:05:45 Day, if you want to.

13019219300

2:05:50 Just the text so they can, or they will.

13019219300

2:05:54 An option. So, if you see.

13019219300

2:05:56 They're still clock in and it's running past you lot of time. You can just drag it out a little bit. So.

13019219300

2:06:03 So speaking, so a lot of time on a service call, we never know what the lot of time is gonna be because we have no idea is gonna be 15 minutes or three, but on a maintenance contract, when he sells the maintenance contract, it's like, okay, this spring, PM is scheduled for 12 hours or say it's four hours? Will that automatically, if we program that in, when the contract is sold, that will automatically block off four hours?

13019219300

2:06:32 Available jobs please? Yup. I.

QUINTON

2:06:44 Available jobs?

13019219300

2:06:56 Guess the terror.

13019219300

2:06:58 Example of it because none of these have times associated with.

QUINTON

2:07:01 I know what you're looking for one sec, Jake because these PMS had a bunch on there earlier. I'm not sure why they don't it's because we're in a different office. Give me one sec. I think... maybe I'm wrong.

--- Next Steps ---

13019219300

2:07:16 Should show up right there.

QUINTON

2:07:21 Yeah, I don't know if we have any.

13019219300

2:07:25 There's no time associated with it.

QUINTON

2:07:33 There it is Jay.

13019219300

2:07:35 Thank you.

13019219300

2:07:39 That.

2:07:40 Okay. So we assign that. If you don't mind if we assign that, how does that pop it into the next day or does that push it just in the same day for 12 hours? Will it stop at our normal stopping time at five o'clock and then create another work order for the next day? Yeah. Okay. It just tells you 10 o'clock or 10 hours as here to know, right? Eight hours and two.

2:08:08 Yeah, but I can just go in, make another appointment for the next.

--- Next Steps ends ---

2:08:11 Day?

2:08:16 When you well... out of my scope, but when you extend the time on a PM that you have assigned amount of time for, is there somewhere that we see that? So, if you sold it at four hours and the guys are taking eight hours, are we gonna know that based on that?

2:08:35 Run reports on that and compare it. So really you would run a report and then export it to an excel sheet and you'd have the columns of estimated time and actual time and you can just kinda run that in bulk every once in a while, check it. And as long as it's pretty well looking good.

2:08:52 Caught on the day, you can see if it's scheduled for four hours and he's supposed to be there?

2:08:58 Yeah, no, I mean more macro kind of looking at, right? Are we?

2:09:02 But at 815, you know, half an hour before he's supposed to be finishing up. Yeah. Hey, how are you making out? I suppose to be finishing up by, you know, or if they go over?

2:09:12 You're thinking like where's the auto generated text that goes then?

2:09:16 Why are you in this? You should be completing this on the next 15? Yeah, one hour left at your P?

13019219300

2:09:24 And then after some, you can go back into like a costing report, correct on each work order. Yeah.

13019219300

2:09:32 I'll show you a little job call summary on and you can also create like a really large PM. You can create a budget and a large TAM job, I guess not. But like quoted work, you can take that quote, generate a budget from it and then track how you're doing to that budget, you're delivering it.

13019219300

2:09:49 On that same note.

13019219300

2:09:50 If you go to customers.

13019219300

2:09:52 And then the... contract section. Yeah. So I think it's a...

13019219300

2:10:01 Is gonna be the first one to pop up and click on that one. So these contracts, we can tie the recurring billing into the same contract as where the work is actually being delivered so you can understand how much it's costing you to deliver that work. And then all the invoices that go out under this will compile underneath here. So I've got 32 invoices for 14 grand.

13019219300

2:10:27 Under that accordion. And then up at the top, right?

13019219300

2:10:29 I'll show you what your expected margin is, and then what your actual margin is on this contract.

13019219300

2:10:35 As a whole, we're...

13019219300

2:10:36 Getting to try rate demo.

13019219300

2:10:46 Yeah. So that's hey, another location call is that they have a specific pricing thing that they need. Great. We'll just... copy it or create a child.

13019219300

2:11:00 You never get a look at that.

QUINTON

2:11:05 Hello?

13019219300

2:11:05 Man... we're quaint.

QUINTON

2:11:10 This is great. It's probably.

13019219300

2:11:11 The best.

QUINTON

2:11:13 A...

13019219300

2:11:14 While jays in person... you also have renewal.

13019219300

2:11:21 Notifications and stuff. So you can say, hey, three months before any contract expires, send a notification to the salesman to go renew that. Okay? That's cool. That was a lot.

13019219300

2:11:35 Yeah.

13019219300

2:11:38 What else do you wanna see? Think about?

13019219300

2:11:40 Talk about... a quick question just from a confidentiality for a nondisclosure of, would you guys be willing to put into writing that you will either share or sell in?

13019219300

2:11:56 Of information. Absolutely. It's already in our contract. Perfect. We simply host the data for you. It's always your data. We have no Bill or no authority to share it

with anybody... we... like. Since it's always yours. You can run backups at any time. Some people run weekly or monthly backups?

13019219300

2:12:23 No. Your data is being backed up on a regular basis without us doing an inhouse back.

13019219300

2:12:28 Yeah. So we run on Amazon web services, which is really the most pretty much everybody runs. It runs on it. A lot of big national banks run on it that.

13019219300

2:12:43 Yeah, our stuff isn't gonna get sold or.

13019219300

2:12:47 Fail. Apparently.

13019219300

2:12:49 But it's a very...

13019219300

2:12:51 System. And the 10 years that we've been on it, I think we've had one outage that lasted about 90 minutes. Other than that, we've been a...

13019219300

2:13:00 It didn't we use Amazon at first when we went with.

13019219300

2:13:06 So, now it's one.

13019219300

2:13:09 Okay. Didn't we have a problem with the amount of data that we had and the storage capacity wasn't that a problem at one point. I.

13019219300

2:13:17 Time, they had us where they had our memory, where we have repeated backups daily, but we're...

13019219300

2:13:24 On the tail and every so often we save.

13019219300

2:13:26 EPA a permanent copy that will has a separate expiration. We were just, we were dangerously close to our maximum on. So it started to impact our performance a little.

13019219300

2:13:37 Yeah, no, that.

13019219300

2:13:39 Is there okay?

13019219300

2:13:40 No limit on the amount of data that's what your subscription covers? Is we're pretty much saying is as much as you want if it starts to cost us money that's us for us. But like you're not gonna use that. We have six to 800 technician companies running on this. So it's like everybody's data is in the same plane, but you're on your own seat, so no one customer can see somebody else's data. But in order to kind of... function at scale, everybody's is kind of moving around together. Big data stuff is all over my head but... it's like there's three different places in America that bounces between that's constantly backed up in two extra locations, but also like for where in some places?

13019219300

2:14:39 Questions?

13019219300

2:14:39 Since you meant like on the backup is, do you have a desktop version and I'm gonna say business continuity, let's just say Amazon goes down and it's for more than 90 minutes because obviously, this goes down. We go down, right? Is their ability to desktop version, you know, those are desktop version that we could then use the backup data to function temporarily?

13019219300

2:15:02 Not that I know of. I don't think.

13019219300

2:15:06 Question...

13019219300

2:15:07 Back to manual John?

13019219300

2:15:10 They may...

13019219300

2:15:10 Not know what manual means?

13019219300

2:15:12 But you too low house?

--- *Small Talk* ---

13019219300

2:15:15 Fact when I first started working in HVAC, so.

13019219300

2:15:20 Have some looking at ServiceTrade right now, and they're still running on that.

13019219300

2:15:25 Wow.

13019219300

2:15:26 Yeah. Well.

13019219300

2:15:28 It's hilarious. Well, kinda in our Salesforce and it's literally like when the grandmother, Beverly dies, we can go back because she kept putting a stop to service trainer.

13019219300

2:15:40 It was back.

13019219300

2:15:42 No man knew, but you can.

13019219300

2:15:43 Like then keep all going... actually on their page and.

13019219300

2:15:51 For that says once that really does.

13019219300

2:15:53 You might get a sale here.

13019219300

2:15:56 There was a four arrow trick where... arrow and then it would drop down and.

2:16:02 Tell me that are using thermal paper, he's probably too young, the switching paper and it was Amy and slippery and it was terrible. It was called thermal paper.

2:16:23 And over time, it would just disappear anyway.

2:16:25 Yeah, it would turn black, the accountability.

2:16:30 Right. Yeah. The entire page that I got back to you would turn black after the.

2:16:35 Yeah, we do pain. Perfect is a big deal. Yeah.

2:16:41 Confidential information. So it just disappears ever.

2:16:44 Yeah, I...

2:16:45 Got, yeah, now we go back to the future, right? It's almost like if you go to the gas station stuff that prints out.

2:16:53 In, but if...

2:16:54 If, if you leave it in your car and the sun hits it and it turns black, that's kinda what happened there?

2:17:00 What the fact? Believe it or not? I?

--- *Small Talk ends* ---

QUINTON

2:17:08 Jay. Yeah.

2:17:11 When you're sitting over to here being real quiet and mind of my own business coming boys, complexion?

13019219300

2:17:20 This scalable meaning that, can you take this from a laptop to an iPad to a phone like and then vice versa for, can not that we do it now, but could our technicians create tickets in the field? Yes, the...

13019219300

2:17:38 And you can get, they can do it through.

13019219300

2:17:40 Ap, there's a section where you can go in and create a work order for you to quote that stuff based on permissions, of course, or you could just kinda give people log in to the web. You can have as many people in there doing that permission space as well. People may not.

13019219300

2:18:05 Yeah.

13019219300

2:18:05 Capability, but they can go in and view equipment and that's...

13019219300

2:18:09 I've just been in the position before where you are, me like you're the on call person and you're taking your laptop to dinner so that you can load calls. If you get a call scenario, cool.

13019219300

2:18:21 The other thing you can always do is just after maybe tomorrow or.

13019219300

2:18:28 Safari and go to ap dot ServiceTrade, dotcom, and literally get to the office view of service trade on your, so I wouldn't do it every day because it's gonna be super small, you have to Zoom in to get the stuff. But in a pinch, yeah.

13019219300

2:18:42 I just had a scenario where like say what you could do that, and then every button that you, I was like off the screen and you couldn't move over. So then you knew where it was. I couldn't hit anything.

13019219300

2:18:57 And can...

2:18:59 Schedule a technician from the call without going to the dispatch?

2:19:03 For... an appointment?

2:19:08 And then automatically put it on the.

2:19:15 What was the other one? We've been here for so long the map? Can you dispatch directly from the map? Okay? That was one?

2:19:25 Yeah. So a lot of people will have the dispatch board up constantly and then maybe another screen with the map and then another screen that I'm working on. Like everybody has so many screens nowadays. You can have it all running together. So, one thing that I would suggest is the dispatch board does kind of... significantly more bandwidth than the other pages in service trade. So, a lot of people will take that dispatch board, pull it up in safari and then run everything else out of Google pro or something.

2:19:56 Is you're distributing?

2:19:57 Get around it? Yeah, exactly. But it all updates, fly constantly back and forth since it's a web app.

2:20:08 Now, do you have a, is there a demo available? Because it's one thing to watch somebody else maneuver through software like this, but sometimes there's an added benefit. If there was a demo that was available that anybody here could kinda go through and sort with and play with? Do you have anything like that available?

2:20:27 Yeah.

2:20:27 Not really. Because with those sandbox accounts, it's kinda like buy a house with no furniture in it. Don't really know where to sit down and there's no, if you wanna, if you have certain workflows that you wanna look at. I'd be happy to either click through here or I can get on a Zoom with you and give you a log into my demo account and you can click through anything that you're concerned about. Yeah,

absolutely. But... we try a demo account with a couple of people and you'd be surprised how many people just like don't ever log in. And then it's we have to spend a bunch of time setting it up and they don't know how to use it. So much of our onboarding is training you on how to use it with your own data and all of that.

<div align="center">13019219300</div>

2:21:17 So, how would generally say it takes about three months to get start up to start with? Okay?

<div align="center">13019219300</div>

2:21:27 Right now, we have a couple of spots left for April first start of onboarding. And so then you would be looking at going live, likely in June, maybe the end of may.

<div align="center">13019219300</div>

2:21:41 Yeah. Let's do it.

<div align="center">13019219300</div>

2:21:46 Mechanical...

<div align="center">13019219300</div>

2:21:48 Tractors that go live over the summer because I mean, the sooner you did go in on it, the sooner you'll start to see the benefit of it and there's never a good time to.

<div align="center">13019219300</div>

2:21:59 Open into the pool.

<div align="center">13019219300</div>

2:22:00 I guess, yeah.

<div align="center">13019219300</div>

2:22:01 We've just, we've had some transitions that occurred when we thought it's only gonna be a couple of hours and then we're something happened and then we're down and then what do you do? So we just shy away from that.

<div align="center">13019219300</div>

2:22:19 And that... just, I guess go back and talk to your team and just see what the realm of possibilities are or something kinda came up that was in that might facilitate that timeline. It's interested to make sure that we're at least on standby list that if somebody dropped out or delayed theirs, that we could insert or potentially go in to kind. That would be good information.

<div align="center">13019219300</div>

2:22:44 April first is only two weeks away, John.

2:22:48 But if we're 30 day, we're 30, we're three months from then, where we're doing?

2:22:54 He's saying it could be quicker than.

2:22:57 On the first. But then most of it depends on how quickly you are getting us the data that we need to set things up and how quickly you're reviewing things to say, hey, you gave us the data. Great. We enable it a little bit. We're sending it back to you for review. How long does that take? I split on that? I mean, people go live in like I said, like three weeks?

2:23:18 Do you tell us, okay, bare minimum? We would need this information... to get it going.

2:23:26 It's a great point. You have all of your asset information like a model, so.

2:23:32 Okay. We...

2:23:32 Don't...

2:23:33 Even have to worry about importing asset information because it's all crap.

2:23:36 Kind of recurring services you have that recurring services?

2:23:41 As far as.

2:23:43 PM schedules.

2:23:44 Intervals...

2:23:45 A contract?

2:23:47 So...

2:23:49 You go in and go what months are, and it just lists the months that are in all in a single field. So that is, I don't know what format that's gonna fall into. What are you looking or?

2:23:59 Do have that information in the...

2:24:01 Info, correct?

2:24:02 What he's saying?

2:24:04 One line item, it's not really a formatted.

2:24:07 If you could give me an example of like one or two lines of that, what that export?

2:24:13 It looks like. I mean, I can pull up.

2:24:15 Import templates, and we can just kinda compare.

2:24:19 The thing is we wanna say, okay, can we take file maker and say we need this box? We need this box and we create a report from file maker that has the field and either it does have it or it doesn't so then we can get that to you. And then we know what information we need to plug in.

2:24:37 Yeah. So I'll pull that up.

2:24:39 We've had a discussion. Yeah, if you, if you've gotta go do other things, I get it. But if you want to hang out.

QUINTON

2:24:45 I got nothing else to do, I might as well hang out with you guys.

13019219300

2:24:48 All right. What exactly I have it on paper, state and go to the bulk import of recurring services and then pull up that template. Yep.

13019219300

2:25:15 I need one that has a contract.

13019219300

2:25:20 Password, so the good news is our data goes back to 1993. One thing we can't really bring in. You wish... that format.

QUINTON

2:25:32 Thing is.

13019219300

2:25:33 All different. Okay. So as far as service calls, any history that we have on a customer will not transfer over.

13019219300

2:25:41 That is correct.

13019219300

2:25:42 We are only transferring.

13019219300

2:25:43 Some information customers.

13019219300

2:25:45 Okay.

13019219300

2:25:46 The customers.

13019219300

2:25:47 Location, the assets.

13019219300

2:25:50 Have a recurring service intervals. So no, we would just tie all the buildings and then over the course.

13019219300

2:25:56 That first year, you can have technicians start to document, make model zero number, that sort of thing.

13019219300

2:26:02 I wouldn't trust any of our asset information because of what we.

13019219300

2:26:06 Lately, see a lot of it, everything was kind of captured. Originally, the old information was just all in one big box text.

13019219300

2:26:17 Okay.

13019219300

2:26:18 This was our old equipment list here.

QUINTON

2:26:22 Hey, Jay, we're gonna grab a drink real quick. I'll be right back. Yeah, sounds good.

13019219300

2:26:26 And back while you're at it.

13019219300

2:26:30 He's a deal. He's got it.

13019219300

2:26:34 And then when we upgraded, we enter these fields and the technician can see these so, but I don't know how accurate any of this is. So I would hate to put inaccurate information in the new system if we're starting fresh, you know?

13019219300

2:26:49 That very smart to 90.

13019219300

2:26:51 We need to start, I don't wanna, I... to that's right? So this is where the data is.

13019219300

2:27:00 So really the only required recurring service really concerned?

13019219300

2:27:04 The lack of the service line service start to have access to that's...

13019219300

2:27:10 He can use, and that's fun. Like... as long as I have, we get to it.

13019219300

2:27:26 Here's where right now?

13019219300

2:27:28 So... customer information, customer billing?

13019219300

2:27:38 Address, phone number now, I usually the...

13019219300

2:27:48 If you can information correctly, all formulas to rate all the...

13019219300

2:27:55 Same thing here if...

13019219300

2:27:56 These are the billing month.

13019219300

2:27:59 Contract, and we visit quarterly.

13019219300

2:28:01 Got to separate because we have got an abundance of.

13019219300

2:28:05 Yeah. Sorry, he just happened to hand me the computer.

13019219300

2:28:09 More on we have after.

2:28:12 And then we can pick.

2:28:13 And choose the data that we feel we can prioritize those.

2:28:17 Service information that we can... gonna have more documents... that... I have somebody to pull in you like to.

2:28:33 Customer account... start.

2:28:41 That location at this one time services recruiter head are gonna be items and prices.

2:28:46 Okay. Now, like you want one of the required fields, are we able to go back?

2:28:52 I mean, we only have that now. I don't get it, right? I mean, it's part of the...

2:28:58 Services?

2:28:59 Training. Okay. So, the next service?

2:29:01 Just everybody involved.

2:29:09 That says contract originally started in.

2:29:14 And then they're still using this. So it's still gonna be an active program. You can always go services?

2:29:22 Those separate.

2:29:23 Because that's what they do. Let them do what they're supposed to be.

2:29:29 That... whatever it is. Well, that's...

2:29:35 I wasn't visible, right?

2:29:38 So, the start date that they're looking for, I'm...

2:29:41 We're gonna go.

2:29:45 We have our January PM would be start February September and we just need to export this information into an account program?

2:29:55 Embrace 100 percent of our past?

2:30:14 I...

2:30:15 I'm gonna be real.

2:30:17 Yeah.

2:30:21 Excited hearing.

2:30:24 And do you guys just do demos like after today? We'll never see or talk to either of you will?

2:30:33 A letter more, right? And import it?

2:30:36 Very that.

2:30:40 Management is a...

2:30:41 Different, however I'm always.

2:30:47 If I get.

2:30:47 Mad, I can call, you know, trying.

2:30:51 So, I have a question... once you see somebody getting out or there?

2:30:58 In the transition or what is your turnover rate the other project manager?

2:31:04 Because we went to source program, we ended up with three.

2:31:08 Different project managers and we basically had a start from scratch?

2:31:11 And then they try to Bill us for the time because wait, your, and you send us somebody new, so we have to teach them how we do business so they understand service?

2:31:29 I sing.

2:31:31 It out.

2:31:32 Information we need... four weeks after that, and it just through.

2:31:37 We go to whatever actual customers are.

2:31:41 People who... we don't know?

2:31:45 No, we answer.

2:31:48 I called...

2:31:48 Alone.

2:31:51 He plays a video game 20 yourself. Do you have us muted? Or do we have him muted?

QUINTON

2:32:00 I was muted, sorry, no, I, I've got you guys on this screen and I'm doing my other task on the other screen. No, no games.

2:32:10 He was... your full screen really looking over here. You just... what do you know?

2:32:26 I asked him what is the turnover rate of their project managers once we get a project manager? Because when we tried to get file maker, we ended up with three different project managers and basically had to start over again. And he said he only had one instance of that. How many project managers do you have? And do you say somebody were to get sick? Does somebody else know? Are there dual project manager? So.

2:32:57 Exactly. What?

2:32:59 Really? There's one project manager and then a couple of data people. Okay, the data people, I mean, generally, their social skills aren't...

2:33:07 But they can run a meeting and...

13019219300

2:33:15 They need.

13019219300

2:33:15 To, right? Okay. And not as much concern, think file maker is a custom. So somebody has to learn or custom. We're asking the consultant to be, and then they change and somebody else, we end up paying them a significant amount of money, figure out. And we have an unorthodox it was developed with a lot of school, Joe scripting wasn't textbook that they would teach a file maker. He figured out how to do a lot of stuff. So, you even ask him what did you do in?

13019219300

2:33:41 So, somebody would have to go into.

13019219300

2:33:43 Go through in to go. I don't even to begin to decipher how he did this is I can redo this whole thing this way.

13019219300

2:33:51 So that was really weird. Change over person.

13019219300

2:33:54 The master of the product. Yeah.

13019219300

2:33:57 Like...

13019219300

2:33:59 Reinventing the wheel when it's already going, you just got to find the right customer. And that's why we're so selective on the type of customer we bring on. Because if we have somebody doing residential service... sorry, go to service the, they're what you need because it's the workflows that you all do versus somebody just down the street versus like guardian fire here? Very similar. Yes, there's a new ones but it's everybody says.

13019219300

2:34:26 We're a very unique company you are because you're a very unique industry.

13019219300

2:34:32 For so.

13019219300

2:34:36 And then we'll come.

13019219300

2:34:42 Into that.

13019219300

2:34:44 I mean, I would take calls until two o'clock in the morning every night, but I think you, yeah.

13019219300

2:34:50 How long you've been with this company? Three years or stuff inside and out, man, you can answer every question or at least blues, I can guarantee you one thing I did not tell you a lie that's the only thing I'll...

13019219300

2:35:07 I actually came from the world of medical device.

13019219300

2:35:11 Wow.

13019219300

2:35:12 And if you don't know what you're talking about, you better not make it up.

13019219300

2:35:16 Right. You lost somebody on the...

13019219300

2:35:18 Opened up. Yeah. So, I went very quick.

13019219300

2:35:25 Now, the guy this morning, he gets.

13019219300

2:35:29 Yeah, it was bad.

13019219300

2:35:30 Okay... cool.

13019219300

2:35:34 Record, yes.

13019219300

2:35:36 Four...

13019219300

2:35:37 Seven... is down there, you know, everybody in... my jacket. Okay? So.

13019219300

2:35:55 I...

13019219300

2:35:56 Send you an email. My contact in. We're impressed with the fact that you're sitting here.

13019219300

2:36:02 Yeah, it was actually really good.

13019219300

2:36:05 Do this, I just have somebody kind of being able to answer without lagging.

13019219300

2:36:12 And I can tell you the first guy we had this demo, he was great too. He was good.

13019219300

2:36:17 Remember his name?

13019219300

2:36:18 Yeah, that sounds great. Yeah. But you guys really?

13019219300

2:36:22 You know, your product, I'll tell you that. I appreciate that.

13019219300

2:36:27 You've never been in the industry. I mean, you've never been in the HVAC. I have never worked in the industry. Now, I work in the building supplies industry for while then.

13019219300

2:36:35 Medical device sales. It, it's not the same really, but I know the product and...

13019219300

2:36:42 I found that.

2:36:42 Like...

2:36:43 Start quitting I...

2:36:45 Bet started cold calling, and the easiest way to just learn about the industry is to just somebody wants to bitch, complain about something.

2:36:53 You...

2:36:53 Listen to it, and you hear these are the problems that these people are running into our software. Does that? Okay?

2:37:01 Understand.

2:37:01 Really where the value of it is rather than just saying.

2:37:04 Hey, look at this shiny new toy. I can walk anywhere and sell it like, no.

2:37:09 You gotta understand what people need before you can.

QUINTON

2:37:13 I was actually a technician out in the field doing residential home sinemas and full automation systems for large homes. And so, when I made the transition to sales, everything kinda clicked because I use software too. I actually used file maker. It was through eye point.

2:37:31 Yeah. So I actually have.

QUINTON

2:37:35 Experience using it. Yeah. And it's it definitely had some of its challenges but making the transition kinda made everything flow easier of understanding what you guys deal with on a daily basis.

2:37:48 You...

2:37:49 Wire crawl.

2:37:50 And stuff.

2:37:52 Yep.

2:37:54 Look at... it. I need to get a proposal together for you. I'll figure out exactly onboarding timelines. We want to move forward... and try and do it before it gets crazy hot or I'd be pushing it.

2:38:15 Map it out. And based upon the discussions we've had here's, the idea you just saw the fields. I was gonna say if you have a template of your fields of information, I would love to see that because I want to compare that to the, our data, the way it's formatted and kinda get a sense of if we went down and will it down to active customers, got rid of a lot of the old archiving stuff and reduce it down to basics, how much manipulation it was gonna take on. I'm gonna say, right? To prepare that data for the import.

2:38:44 A big.

2:38:46 Question in my mind that you get. So.

2:38:48 Well, that's since you're not integrating service calls the notes and you're not doing any history, it's just our customer database, which I even think that I have a page in there that the customer it's got the name, the address computer.

2:39:05 But then think about what we got doing that. Think about every agreement has to be either manually input, if it's not in a format that's going to export and import.

2:39:15 Well, the only required field that they have, well.

2:39:18 We agree.

2:39:19 We're not doing equipment, right?

2:39:21 Well, I don't know we've got some equipment that is depending. I would like to look at it because anything we do have in the system that is in the lower fields that can be exported and imported by because those are broken out, that is that's good data if it's in the lower boxes?

2:39:37 Even some of that?

2:39:38 Because remember when, if the guy wrote it on his ticket, it would import it. And every time they worked on the same piece of equipment, it was in there like six times.

2:39:50 Like they say they've got software that will go through and check for duplicates and eliminate the duplicate lines once you break it out into an excel spreadsheet per SE, you're gonna break it out and you're gonna see all of that.

2:40:01 Before the, so I kinda look at it go. I hate to have to.

2:40:07 So, you're going back to re, input all of that data if we can clean it up.

2:40:11 Would be the much more efficient approach and our onboarding people.

2:40:15 To be very honest with you to say this is disable or this is.

2:40:19 No, it's not there.

2:40:22 Well, do you have an excel the?

2:40:25 Can I see what you look like? Because I have a list that I started already start?

2:40:29 Which one are you looking at locations or recurring services?

2:40:34 Location, see the recurring services he's just looking for a date is really the customer and the date?

2:40:42 Because it's a separate.

2:40:43 Program, correct? Am I right?

2:40:45 The...

2:40:46 Money, what's the contract value, where we had in the billings you got to set up the, when is the next scheduled billing? When is the next scheduled maintenance? All of that needs to be?

2:40:56 What you're saying is basically, we have to hear, we have to give you the start date and then we go back and put in all that information in the back end.

2:41:07 So, there's...

2:41:08 Two different pieces of service that we're talking about. There's. The recurring.

2:41:12 Service. And then there's the contract. The service itself is going to be all right. When is our next PM do out there? From that point? How often does it recur? What location is it at? And maybe one or two other little things that are required to import that in bulk. The contract is going to be the larger PM contract that we are going into with our client and say, hey, we're from this day in 2021 till this day, in 2025 we're responsible for these visits that gets brought in as two separate pieces that are then tied together at the location.

2:42:01 Yeah.

2:42:01 So, we were just saying of those all those pieces of information that's why we were looking to see how you had it format. We have to look to see how we've got it formatted. If ours is in fields that will match up with yours or would need to be modify to make it compatible to match with the fields on yours. Sometimes for us like we, you know, a lot of our customer database, you look in and go, you would typically go, we've got it on a single line. You go in and go with the city and zip code. We never put the state in. So you're gonna go into a traditional customer address format, free address, city, state, zip code, all of them. We're going to have to break out city and zip code into. We're gonna have to go through that. It's going to be part of the state based on the zip code, right? And so you're gonna say there's some things of that nature where I'm going, it's not going to be one for one that we can just piece these things.

2:42:53 You guys have longitude and so, like which we would do, but I have use software that like you have to go in and put it in a Google.

2:43:05 Mapping. So, and we have some clients that do maintenance on.

2:43:11 Like oil rig. So, what's an address for an oil rig?

2:43:16 We don't have a couple of those.

2:43:21 Support article right here. The import template will show you all the data fields that are possible. That will.

2:43:31 Show you what's required and then what's optional down below for location.

2:43:36 Yeah, because I mean, I think that's the biggest thing is that you have a lot more possibilities that we necessarily have right now. So we just need to know... what options are there available. So then we could go with the file maker and maybe create a custom report that says these are all the things that we could possibly give you. And then, you know, again, we may not have all the states. We might not have the zip code, but if we give you that, can your people take the information that we give you to put in the other whole?

2:44:15 I don't know, but we can have a, that when that the right next step would be.

2:44:25 With deck or with Steve Parker?

2:44:28 So that we can kind of get some of their examples of exports and they can just get eyes on them and kinda better understand. All right, if we're just doing customers location, recurring services, how easy is this going to be, right? And then we can get a better idea of timeframe from there on what?

2:44:48 Gonna tell us what is in the realm of possibility, but that is one of the pins of the whole deal.

2:44:55 It means, okay, we give you the customer list first. And then we take a week to put together the contract information and we give you that piece next because there are two separate, there are two separate fields that we combine together. Then we can at least get started, correct?

2:45:12 I mean, our data doesn't need to be separate if you're doing import and you're importing our data, you can take which fields you're wanting to transfer and leave the other ones that are not.

2:45:21 No more of what I'm saying is there's no question of whatever data we pull out of a, we need to clean up. So if the expectation is we're gonna give you the first initial clean up, but then we're gonna go get the rest of the information.

2:45:37 And over locations and customers, we work on that and then you start working contracts or recurring services. And then once we get the locations in there, then once we clean up the contracts, we can import those to match them up to the customers. Yeah.

--- Next Steps ---

2:45:53 You can achieve if we're just exporting it out, we just focus our clean up on the, these fields.

2:46:00 Yeah.

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2:46:01 And then we'll work on this, but... I'm just thinking mechanically how I would do it, but.

QUINTON

2:46:11 Yeah, Jay, there's some time that Jack's calendar tomorrow at two 30. I would say we do that quicker than later. Do you guys want to join that meeting or Jay, do you think that's something that we can just go ahead and knock out ourselves? And then we can have a follow up call.

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2:46:28 Pretty cool. That'll be critical to have somebody from your team on if we could do that either just sometime this week, I guess sooner, the better.

--- *Next Steps ends* ---

QUINTON

2:46:36 Yeah. The reason why I say tomorrow is because there's four spots left for that April first date. So the quicker that we move just to make sure we can secure that April first day for you guys.

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2:46:48 We're gonna see on.

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2:46:50 So, then if April first goes, what's our next April fifteenth?

QUINTON

2:47:01 Would two 30 work for you guys tomorrow?

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2:47:06 I work, we're at nine o'clock but we can, we'll be back by the well, we really have three to more, but I don't have to do the rent resting. We don't have to. Okay. Yeah, the answer is, yes, we're gonna make that. Yeah, we can prioritize and make even priority at the.

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2:47:30 Give us an example of a couple of those exports, locations, customers, recurring services so that he can, our guy can at least put some eyes on it. Going into that meeting. That be very helpful. But then he can start to formulate questions rather than excel sheets together. We can do that without being on a call together and talk about the answers. Yeah, talk about the answers rather than.

2:47:56 So, are you gonna be in person again? You just wanted to come back and visit us?

2:48:00 You drove up right now?

2:48:04 This morning, I got to be down in South Carolina on Wednesday and Thursday. So I gotta get a few days. I got married just a few weeks ago and I...

2:48:12 Get married and they just didn't that's a great way to get unmarried were so in.

2:48:22 Columbia.

2:48:27 I never know if he's in North Carolina.

2:48:28 Anyway, I'm even so.

2:48:32 Okay. Yeah, near green.

2:48:34 Yeah, that's it.

2:48:36 Yeah. The owner of the company list down there?

2:48:47 So you're flying back tonight?

2:48:52 And we kept you here very long, say your employee, how long is employee?

2:48:57 30 minutes?

2:48:58 Yeah. I call...

QUINTON

2:49:02 J on Friday and he booked a flight in 30 minutes. He said he'd be there.

2:49:09 Thank you because it worked out, I think for all of us.

2:49:11 Yeah. I'm...

2:49:12 Glad I got a.

2:49:12 Deal. I'll also put together a quote. So we have more formal pricing to talk through tomorrow as well. How many technicians do a 10 to start?

2:49:23 Yes... we're still in the midst of trying to hire, we've got positions. We're trying to shoot a data where we're gonna be... currently right now today, there's eight. So let's say back on nine. Yeah, nine. We gotta be well, actually he's question, I'm gonna have to be have a technician license as well then, right? You're performing?

2:49:53 Work in the field, then you?

2:49:55 If he's an office person, but also doing that, is that going to be two licenses? No, the office is great, right? Okay. So would need a tech. You did that. We should bank on 10? Yeah. Okay.

2:50:08 And then if you grow from there, it's just add them. Whenever you add somebody else, we're never gonna limit you from adding them will just kinda that's so what is the term on the licensing annual? And then you want to start with the peer generation capabilities or push that off until later?

2:50:35 I think for now on a proposal, you just want to add it as an option. But I think the discussions are ultimately going to end up with us doing as, is that a separate?

2:50:44 Yes, it is. And then the recurring billing that is there's three different levels of service rates like premium and enterprise with your contract mark up rule and all the functionality you need, you certainly need to be on premium. And then going from premium to enterprise is what would drive that is reporting capabilities if you wanted to have more advanced reporting and running recurring billing out of service trade. So I assume we would wanna do 10 technicians on enterprise so that we can do the recurring billing, all of the same place and then also have the and po generation piece.

2:51:27 If you break out the cost, so we can see the cost associated with each piece of that, yes, for discussion purpose here. That makes sense.

2:51:35 Now, the import, do you need the information? You have a recurring billing which is a separate entity. So you need different information for that than you do for when we're servicing that's right? Okay. So we'll make you what essentially you would have one report that, the customer information, and then we have another report that's the agreement information.

2:52:04 Right. But the agreement information could be the agreement information is different than the billing information, yeah.

2:52:11 This is just going to be an ongoing conversation for back. Okay? Because he knows a lot more about the format in which all this has comes in and he has a couple of tools that I don't have access to. You can easily mess things up very quickly. So, he has some special developer tools that he's built out to bring extra information. All that he'll let me know about those, the developer tools on.

--- Next Steps ---

2:52:43 A smart enough to go. Yep. I don't want to. Awesome. Well, we will, I'll go get you a card. I've got one. I promise, I'm a real person... and quit you invite out for tomorrow. You, are you?

QUINTON

2:53:00 Yeah, that should be already in your guy's inbox for two 30 tomorrow.

2:53:05 Solid from there. And if you want to get me exports as soon as you can, that'll be great.

QUINTON

2:53:11 Thanks guys. It was nice meeting you.

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2:53:12 Very much.

QUINTON

2:53:13 Thank you guys. Well.

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2:53:15 Tomorrow. All righty. Save travels, Jay. Thanks, buddy. I'll catch up with you soon.

The End