Followup ServiceTrade Demo with Five Star Mechanical, Inc.

Rick Abbott with Five Star Mechanical - WA
Recorded on 3/14/23 via Zoom, 2 hour s 58 min.

Participants

ServiceTrade

Rick Abbott
Field Manager

Tanya Eney
Partner Manager

Reinhard Kampf
Project Manager

Lauren Rice
Director of Enterprise Sales

Brooke Caskey
Territory Manager

Other

Phone Caller #1

IPhone

Jessica

Five Star Mechanical

Topics

Transcript

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

TANYA

0:00 Good. NC state around.

RICK

0:03 Nice. Good morning. Five star. Who is that trying to remember?

FIVE

0:08 This is Andy?

RICK

0:09 Andy. Yeah, I was trying.

FIVE

0:11 Look.

RICK

0:12 Boy, my eyes aren't working this morning, Andy. I'm sorry. Hey morning.

FIVE

0:19 Good morning.

RICK

0:21 Hi, Jim.

FIVE

0:22 How's it going?

RICK

0:23 Very good. Very good. Hey, we're about five minutes in. We're trying to keep to the schedule we have. So I just wanted to make sure we're all good.

FIVE

0:32 No, we're good. We're getting everybody kinda wound in real quick. I think we're going to bring.

LAUREN

0:40 For the first part.

FIVE

0:41 It's gonna be John were for the Construction portion, project management, job costing portion. And then in there, we'll kinda cycle in. I'll go make alerts and let everybody know what time they need to head up.

--- Pricing ---

FIVE

0:54 So they'll be standing by. So dispatch will be in next. And then after dispatch at 10 O5, will be the accounting team. And then I'll be back in here from 10 30 to 10 55 for the service sales, PM, contract stuff. And then I think the 10 15 to 1,120 is probably all you.

--- Pricing ends ---

FIVE

1:14 Yeah, I.

FIVE

1:16 And then kinda wrap up with a couple of us. Any last hand questions to that 1,120 to 11 30. So.

RICK

1:23 Pretty okay. Pretty excellent. Pretty.

FIVE

1:25 We still got business ops going on. So, so there may be some little stuff here and there, but for the most part, we've got everybody dialed in on when they got to be here. And after this little intro thing, I'll go run down and let the first group now. Are we gonna call John in or?

FIVE

1:41 Yeah, I think I thought John was going to be here with us today, but I think he'll probably call remotely.

FIVE

1:47 Yeah, he may call him. Well, he's not here yet for the new Construction portion of it. And if he's not, then I'll go through this. And as long as we're recording that's a big thing to say, we've got something to back up on the back side. So.

RICK

2:01 Okay. No worries there. Well, when John walks in, I'll introduce everybody got some new faces on the screen in front of you. So I definitely want to introduce you all. Okay, perfect. We brought in our 18 to help you out today.

FIVE

2:15 That's what we need.

FIVE

2:17 Perfect. Thank you.

FIVE

2:18 Thank you total.

RICK

2:19 Yeah, we're just.

FIVE

2:21 Through and it's good to be getting in the mindset of, you know, what we need because as we've been trudging through everything over the last couple of weeks, you know, we're seeing... definite points that we want to address. So, so it's been like I said, it's been a really welcome thing for... you know, to put this thing together. And, you know, I talked like I talked last week with you about using kind of this time and prep time to see where we've got some gaps. So, I think it'll be a good, it'll be a good point. So.

RICK

2:55 Well, Lauren rice has been in the northwest for a long time, very familiar with the mechanical space. So we'll just certainly give us some advice.

FIVE

3:07 Is that you said that's Lauren up there?

RICK

3:09 Yeah, Lauren rice is okay. Is the director of sales, northwest, senior director, so.

FIVE

3:16 Where are you at up here in the northwest?

IPHONE

3:19 I've covered.

LAUREN

3:20 The northwest for the seven years I'm actually based down in southern California.

FIVE

3:25 Yeah. So when you say southern California, where is that?

LAUREN

3:29 I'm in Huntington Beach currently?

FIVE

3:31 Okay. So, I'm from northern California. So the argument always is everybody says they're from northern California, and they say, like I'm from San Jose is not northern California.

RICK

3:43 Anything.

FIVE

3:43 South of reading in southern California. I was gonna ask if you're...

LAUREN

3:47 Near the chico routing area.

FIVE

3:50 So, I'm from crestent city. Okay? So, crescent city, you drive nine Miles outside of crescent city and you cross over in like cape junction area, and then you're Morgan. So pretty much, yeah, about within 15 Miles. So, reading southern California, right? That's...

LAUREN

4:09 Yeah, I'm way, so, Cal compared to.

FIVE

4:12 I wait, so.

RICK

4:14 It all the rain.

FIVE

4:18 Yep. Yeah. I know it's good. Terry is just walking in. So we'll be good with that one. And then, yeah.

RICK

4:25 Hi, Terry.

FIVE

4:26 All right. And if we got, if we have to bounce because we haven't got John or one of them on then we'll you know, maybe we'll flip the things around here.

RICK

4:36 Okay. That's...

FIVE

4:37 Okay. Well.

RICK

4:38 Don't I start with introductions then Lauren rice, the Gal classes to make it easier. She's our senior director of sales here for the west. And then as well, we have Tony Andy, who is our director of partnerships and the accounting side of things. We also have Ryan hard Cam, he was kinda sitting in for azela, but her senior, in terms of managing some of the solutions architecture kind of work that we do in service trade, I think I have that, right? And of course, I, you know, met you all there and really appreciate the opportunity to meet with you here, Andy, and putting this together. Thanks for arranging things and looking at... your schedule for today. Would you still like to go ahead then and start as a new Construction project management to get things rolling?

FIVE

5:35 Well, I think on that. I probably want to wait till John can see it and I know he'll probably be here by 915 or so, but if not, we probably want to, maybe do, we got Terry in here?

FIVE

5:48 Straight...

RICK

5:49 Okay.

IPHONE

5:50 I...

FIVE

5:50 I...

TANYA

5:51 Should...

LAUREN

5:51 Mention that Reinhard does have a hard stop at the top of the next hour. So, okay, probably should start with the project management. We were able to get him on our calendar at the last minute since our solution architect is out of the office this week and he literally writes it. So he's there's, no one more knowledgeable on project management than Reinhard.

FIVE

6:16 I can talk through and ask some of the questions that we'll see that we may have and, you know, kinda get an overall if we go down really on that since John's not sitting here if we bounce through the new Construction project management portion of it and kinda hit those key points for the recording that we got. And then I'll throw in some questions as we go along. Maybe that's the easiest way that way he's got at least this data here for him when he sits back. So.

LAUREN

6:42 That's perfect. And then if we do need a follow up, we can certainly arrange that. But I know Reinhard got a pretty comprehensive demo planned.

FIVE

6:52 Okay. Yeah.

REINHARD

6:55 So I can jump right in. So first of all, good morning, gentlemen. Thank you for a lot for us to show you what we got just a little bit on myself. As Lauren mentioned, I'm one of the senior product managers here at service rate, work very closely with the, what we call our core web teams as well as the mobile teams, essentially building out the strategy and road map as it relates to anything that you experience in our apps. So pleasure meeting you. As Lauren indicated if from today's, call, which is gonna be because of the agenda that we have. And I apologize because of my time constraints today. I'm gonna fly through some of this stuff but it's gonna give you enough conceptual knowledge about what the solution is about as it relates to project management if you will.

--- *Purchase decision* ---

REINHARD

7:44 And then by all means if you have follow up questions, as John listens to the recording, if there are follow up questions, deep dive questions, happy to meet with you separately and then cover those. So just keep that in mind. It's not a one for all type setting today, it's or as giving you enough so you can kinda get an idea of what it is about. And then we can answer any subsequent questions if you have that. So I know that there are specific things that you want to get out of today. I'm gonna cover all that, but I'm gonna try to cover that in a sense of a storytelling concept that you can relate to because that kind of follows what you do with your customers, right? So with that said, it's not formal. If you have a question, any questions, just stop me interrupt me. My feelings won't get hurt. So don't be worried about that. So I'm gonna.

LAUREN

8:41 If you don't stop Reinhard, he will literally keep spending like a top.

IPHONE

8:45 So.

LAUREN

8:47 That advice?

REINHARD

8:49 I'm like your, I'm like you're going seven seven seven, I'll start slowly but then I'll just go and then I will fly.

--- *Purchase decision ends* ---

REINHARD

8:56 You got to stop me. So as Lauren said, I'm pretty passionate about this. I work with the geeks on a daily basis. So I apologize in advance if I get too excited about it. But so project management, I'm gonna start at the section where essentially I'm assuming that you are communicating with your customer and now you want to present something to them, right?

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

REINHARD

9:20 You want to present to them a quote a bit if you will to say like, hey here's the work that we have been negotiating back and forth with you and we would like to present to you the body of work and how that plays out and all the details that comes with that so that they can review, approve and give you essentially the go ahead.

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

REINHARD

9:39 So to say. So I'm in a quote right now here in service rate, the core web app and I've kind of played out the scenario that the customer has asked me to do a body of work, that kind of plays out in different phases. So phase one, phase two, phase three. And there are specific assets that speak to each of those phases if you will. And this, those could play out in many different ways for you. However you manage your business, right? So phases could be a specific services or they could be specific phases of a project and you can break them out however you want to, that's totally up to you.

--- *Quote templates* ---

REINHARD

10:17 And that's the beauty about service rate that it gives you that flexibility to do it. However it's best suited for your business. So I have my description as to what I'm gonna deliver for the customer. So they can clearly see what that proposal is. All about, what the quote is all about.

--- ST app contracts and pricing ---

REINHARD

10:33 I also have the broken out body of work items. And as you can see, I can drill into any of those, I can add specific parts, so materials, I can basically break it out as granular as I want it specific to each of those phases. And I can communicate as much as I want to my customer. I can add attachments. I can add comments whatever I please to do, right? And then I have a general information section where I basically describe each phase as to what will be delivered in that. So I have all that information already captured. Again, there's no limit to how many phases you want to capture as it relates to a particular project or a job. And as you can see here as I can for each section for each phase, I can specify all of the details that I just mentioned. And then at the bottom, you see that I have a designate parts, labor and item section where I can see everything that I've kinda built meaning here's for each phase, what I intend to spend, what I intend to charge to the customer. So I can see my cost, I can see my price and I can kinda track what's happening for each of those bodies of work. So to say, I can capture comments, I can add attachments, all of that typical stuff they used to. And then when I'm ready to share that with my customer, there is a embedded workflow.

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

REINHARD

12:01 So you don't have to step out of the system to engage a new email to the customer. There's a workflow that allows you to essentially get all that information, bring it into that quote that you're sending to the customer. And then you can apply of course, a personalized message to that. Maybe you have a can message that you provide to all your customers. You can paste that in there. And then I can even define the context that I want to send that to, right? And I can also have a preview of what that looks like. So in here, I can see a pretty clean look as it relates to the quote that I want to present to the customer for that body of work that I want to execute for them.

--- Quote templates ---

FIVE

12:41 You manage to exclude costs.

REINHARD

12:44 So when it comes to the templates, number one, we don't include the cost in any of those templates because, you know, we know that is specific to your internal needs. So no need to share that with your customers. But the other good thing is that I have a number of different templates that I can choose from, right? So the system is customized to allow you to define the type of level that you want to communicate with your customers. So I can do line item type with details. I can do a summarized by line item detailed template. I can only do grand total if that's the only thing I want. So there's a number of different templates that you can choose to select to include for your customers. So.

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

FIVE

13:33 This.

REINHARD

13:33 One is a grand total only or a totals only. So it gives them a total for each of the services. And then of course, a grand total at the bottom or I can say, look, I don't want the customer to even see the by service breakout. So I can just quickly go in here and I can say, you know...

--- ST app contracts and pricing ---

LAUREN

13:55 What?

REINHARD

13:55 I don't need the total grouping breakout. I just wanna show them a grand total and just a generic description for what we're about to do. And as I choose that, and I'll look at my revised template if you will. I still have the information specific to each of the services as to what I'm delivering. But then I'm only presenting them with the grand total that's it. So you have flexibility, you can decide which level of communication you want to engage with your customer on. And that is totally up to you. We don't invoke that on you. We don't prescribe only one way of you doing it. You decide what works best for you and your customer and that's different from customer to customer.

--- Assets ---

FIVE

14:39 Right. So all those components will be contained within there and we can change as we need be all the different formats and stuff. Okay?

REINHARD

14:46 Exactly. So the other thing is we have this concept of any attachment and any comments, even the ones that your technician capture. Of course, the comment is entered, you can specify only for my company, meaning it's contained internally or for everyone, which then will be included in these external outputs.

--- Assets ends ---

FIVE

15:10 Right. And so we can talk about the job within the software and capture those notes in there versus email back and forth, which is just archaic in nature and we lose a lot of stuff in there. Okay?

REINHARD

15:21 Got it. Got it. So I'm gonna fast forward, let's just say that you have done a banged up job on presenting a great proposal to your customer.

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

REINHARD

15:30 They're like love it. I would love to do some business with these guys now. I'm gonna simulate the workflow that essentially would naturally happen. You would send it to your customer. They would approve it. So now I have this approved quote and I'm ready to convert that into an executionable job. Go ahead.

--- Tech On-site ---

FIVE

15:48 Got one question real quick. I saw earlier on a screen back there where it said you rep required to approve that was back there when you had that. I just wanna, you know, just, it just caught me you were creating something to send to the customer and then you scroll down, you had like a check mark where you could go down there, keep on scrolling on that. It's on that screen. Right there. You go to the bottom of that.

--- Tech On-site ends ---

LAUREN

16:10 Hard. If you go back to the preview screen.

REINHARD

16:13 Hold on just a.

LAUREN

16:14 Second, where it says send to customer and then all the way down to the bottom under the message. Now further down. Yeah, what's your question about the?

FIVE

16:26 I just, I saw that for a second, but I didn't see what it said under it. I just want to see.

FIVE

16:30 So, if I click that right?

FIVE

16:31 There before I send it out, the customer is gonna have to put a po on that before they can accept it, correct?

FIVE

16:37 Correct.

FIVE

16:38 Okay. I just wanna, I didn't see the line below it, and I just want to catch it before I forgot. So, thank you.

REINHARD

16:43 No worries. So yeah, again, it's all about the flexibility and what we do. Just so you know, as part of product management, we have these principles where we, as we develop new stuff, we like to get closest to our customers. So we have these focus group sessions. We actually have one ongoing this week and we wanna know everything there is to know about that particular topic within your setting. And then we bring it all together and make sure that it works for the entire 1,000 plus customers that we have. So that's there's something to keep in mind that we take that serious. We would like to be as close to our customers as we can as we develop new things or enhance and existing things.

--- ST app contracts and pricing ---

REINHARD

17:23 So going back on track, I'm approving this quote. And now I'm ready to convert that quote into a job that is gonna produce revenue for me, right? So I can go ahead and schedule stuff for my technicians, my crew. So we have a very intuitive workflow where just specified, you know, just concepts about that job that you're about to create. But here's a great new thing that we have. Let's just say you intend to manage this job as a project, right? You're going to have a budget and you intend to as changes happening when I manage that would change orders. And you most definitely wanna track to your points that you made to Rick and Lauren, you want to track your gross margin, you wanna track your labor and all that as it happens, right? As close as real time as you can possibly get it. All you have to do is just say, hey, why are you doing that? Go ahead and make me, you know, all of the budgets and all that stuff that I need. So I'm telling the system make this job a project, treat it as if it was a project that's all I have to do and what the system is gonna do behind the scenes. When I click create project from job, it's gonna create that job record. So everything in service rate is a job. But then jobs could be defined as projects. And then we have indicators so they can clearly distinguish between what is a project and what is a regular job that your crew might be doing. So here's the awesome thing that service, right? Just did for because I have that granular breakout. So you can see all of the things that I've created and captured. My quote is not automatically brought into my job and it has the same structure that I had and my quote. So whatever I communicate it to customers, my crew, you include, it has the same view, has the same baseline understanding. So now I have all of that great detail because I specified that I wanna manage this as a project. I have some other goodies that it did for me, right? It created a budget for me. Number one, it also opened up this capability of the performance tab. So I can clearly track what is my budget versus what is my total incurred cost against that budget. What is my expected revenue? Again? I quoted something to the customer that I expect to make that right? And how am I tracking? As it relates to my invoicing against that? Expect the revenue? And then it also tracks to me. This is just a precursor. What I'm about to show you in the, what we call the whip, the performance page where you actually track your actual progression as it relates to the execution against that project. So I can see what my remaining budget is as I already indicated, I can track my incurred cost and the system automatically does that for you. As you specify that a service is completed and your technicians say, hey, I've used this and that item, it says great. I'm gonna incur that cost great. I'm gonna incur that cost. So there is automatical things that happen behind the scenes as people do their work.

--- Tech time tracking ---

FIVE

20:33 So if a tech, if can you create like off of this, I see the schedule disappointment, I can schedule that to a tech as they close out that?

REINHARD

20:42 Rose appointment?

FIVE

20:43 Or whatever we're gonna term that it's automatically gonna deduct from ours, use whatever parts they use on that portion of it. Is that at happen automatically or is there a manual input?

REINHARD

20:53 So the manual input comes into play, I'll show you what it does from a baseline perspective. But where the manual input comes is I, as a technician, if I go to a job, so you schedule me for this particular phase, I go on the job site. And as I'm clocking in and then clock out the system is gonna ask, and we actually have even further advanced those systems, those workflows in the technician app, where the app is saying like, hey, I see that these items were budgeted, did you use those items and how many have you used?

--- ST app contracts and pricing ---

REINHARD

21:27 So then they can very easily indicate I've used that many labor hours. I've used this much of these materials, blah blah blah, they just do that. And then the system because we have these great API calls in the background, they just gather all that information and just plop it into your whip. So you can see exactly what has occurred almost real time as a technician completes the.

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

FIVE

21:49 Work. Okay. I will just wanna pause real quick. I was guy, so we can go through kinda I'll give them a 30 second recap basically from a quote being created for a project. It was kind of created already. They had all of the wickeds in there that they needed.

--- ST app contracts and pricing ---

FIVE

22:05 You know, this is phase one, phase two, phase three. And then from there, we just went through the proposal that goes up to the customer with the pricing, so on and so forth. Customer accepts. And we took that quote and it says, do you wanna make this a project? Click the button to make this into a project. And now it applies it into the management software, which is where we're at right now. So, 30 second once over the world, right?

REINHARD

22:28 So, a plus for paying attention, that was a very good overview. Now, the other good is that I have because this is a job. I mean, this job is, there is an awesome thing that you can do on jobs and projects, but I wanna call it out. I can give this a name. So I'm just gonna call it Reinhard testing whatever, right? Why is that important? Why do I bring that up? Well, you might have multiple systems that you manage the same project against, right? And maybe you want to have that one nomenclature that you wanna give that project across all your system. You can now do that, that's up to you. So it's a minor thing. But a lot of our customers love this just because it allows you to plop in there, whatever the heck you want to pop in there, right? I can give it a start. And I do buy, right? Because projects have defined start and stop dates. They're not like services where you have maybe a reoccurring service schedule and all that good stuff. You wanna manage your budget against that defined start and stop date, right? And then of course, you can save that. And as I'm saving that, it very clearly provides this visual to the person that's viewing that project that, hey, this is your start date. This is your due by date and you got that many days remaining. Now, we're going to have more functionality plopping in the coming weeks where as you get like close to your minus five days remaining, the system is gonna kinda make that more apparent to you.

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

REINHARD

24:03 So you can kinda see like, hey, you might want to double check some things because you're getting close to the, you know, last five days and you still got a little bit of work left, right? So the system is gonna try to help you along to kinda keep you on track. Now, let's just say we went through our quote, we converted it to a job, but I now wanna.

--- ST app contracts and pricing ---

FIVE

24:22 What does my...

REINHARD

24:22 Budget look like because I wanna know that well, you have this wonderful page where you can kinda at the top. We call it the executive summary. This is a cool thing, because guess what? Let's just say a project that you manage might have 300 line items of these things. And maybe you're not the type Andy, maybe you're like I'm too busy. I don't wanna look at every single thing that Rick did. I don't care about that. I just wanna see if it's conceptually correct? What do I mean by that? Well, you can look at the profile of the budget and you can see if conceptually it meets your standards. Hey, on this type of project guys, we typically like to be at 60 percent labor, 24 percent, whatever you can quickly see if somebody messed up or if they did the right thing. So that's why we have this donut, we call it a donut to help you like the name. But this donut allows you to essentially view your profile of that cost structure. If the profile doesn't make sense, you can quickly identify where you should drill into a little bit more. If you typically expect this type of project to have a lower or higher rate in labor. Guess what? Now, you see like I gotta look at my Rick and labor. Somebody screwed up, right? So that's what this allows you to do. It also gives you the impression of what is your overall value, your expected revenue? What is the margin within that? What are, what is your budget total? As well as your revised? Because as you negotiate with the customer, even after you were rewarded to the project, maybe there's some things that they're saying like, hey, I forgot about this. You can edit your budget. So you can certainly do that. You can look at all your details broken up by the, by each of the phases. So you can look at your budget, you can look at your price, you can look at your... margin. You can of course, see your individual cost and you can kinda drill down into whatever scenario you please to, right? So it gives you all that flexibility so that you can ensure, I mean, your team can ensure that as they're checking off each step of that project management concept, they can be rest assured that, hey, we're looking at all the things. We're making sure that everything is correct.

FIVE

26:38 I had a question for you. Is there a way to see a little bit more clearly? Like how many labor hours are left? It seems like labor is in there as another line item, the quantity. And then at the top, everything's sorta summarizing dollars. Is there a way to see those labor hours remaining?

REINHARD

26:58 So we'll get to the remaining stuff. We're still talking about the budget. So this is just you creating the budget. There is nothing remaining because you haven't started the work yet, right? This is just kinda helping you along to make sure that your budget is right? We'll talk about the web where you can see what is actual versus what is planned, right? Because that's a whole another that's where you manage the actual work. We're still in the budget management to make sure that did we do everything right? Did we capture everything once you do that? Then you move onto your web, right? Because now work starts here's, the great thing we allow you to of course, do that exercise. And now you can say, hey guys, I'm gonna lock this budget in. Everything looks good. Lauren signed off on it. Tanya feels great about it. Rick had some issues. So we made some changes, but now we're good. So I'm locking this budget, it then this is a great way for you to instruct and create. So PS to say guys when the budget is locked. And by the way, as you probably already imagine, we have permission settings, so you can say who can lock a budget and who can not lock a budget, who can unlock a budget and who can not unlock a budget? So as you have a project manager saying like we're good guys, we can start work, they can lock the budget and guess what. Now everything that happens thereafter would be considered a change order because we lock the budget in. And now everybody should operate on the same assumption. We planned this. We have a fixed fee that we're working with by golly. Don't mess with the margin, stay on track. So those are all things that we offer you to make sure that you stay on track that you manage the budget to the best possible outcome. And then of course, we have ways for you to make changes, right? So you can create change orders against anything that may happen, right? Maybe the customer, Lauren is being a paying the. But, so she wanted me to change some stuff. So I'm moving stuff around or Lauren is like, you know what? I just got this great funding. Let's just do the other phases two, phase six, seven and eight. I can add more stuff to it, so I can bring in more value to my overall expected revenue. So the system allows you to do that. The awesome thing about change orders, change management is the fact that again, just to show you a couple, I can change existing items so I can say, okay, I'm gonna change the price, whatever I can add specification to that here's the cool thing, there is a workflow aspect in where you say, hey, I wanna share this with the customer versus I don't wanna share of this with the customer. Now, why did we do that? The difference is that one is an external change order, meaning it has revenue implication that you want to have approval from the customer and the other might just be an internal meaning. Andy told me to make this change and guess what that change we screwed up. We thought the cost was going to be this, the cost is higher. I want to reflect that because we're going to have a return on this project. So I'm gonna reflect that it's an internal change. It's not going to be presented to the customer, but I have record keeping of that and it's also recorded in the project. So I can see when it went from this to that, right? So I can see when the margin dropped because of whatever happened. So I can create internal change orders. I can add external change orders. The beauty about that is when you have that, just like we did with the quotes, the system says, I see you made an external change order.

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

REINHARD

30:36 If I had made internal change orders, it would show that to me as well. And then I can add attachments that can be presented to the customer. Same concept. Again, I can add a personalized message and I can send it on to the customer. I'm gonna pretend that I'm doing that, but I'm gonna send that to myself.

--- Quoting ---

REINHARD

30:57 Do this. We're not gonna bother that person and I'm just gonna pretend I'm sending that on, right? So here's the beauty, it tells me that there is a change order pending. So I have that visibility. I can also look at the change order history and I can see that there is a change order that is awaiting customer approval, but what did we send to them?

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

REINHARD

31:19 So if I wanted to see what they received, I click on this number and I see exact ally what the customer was presented. So again, this professionalised professional look that you presented to the customer. Hey, we're making a change. Maybe you have that conversation with them prior to that here's. The change order, the official change order and they can approve or request changes to that change order. So it has this really cool workflow keeping your customer informed as to what the heck is going on and what you need approval from them versus what you don't... let's just say the customer is a little bit of a pain in the butt.

--- *Quoting* ---

REINHARD

31:56 So maybe they're like, you know, what you talk to me about that? I don't want to hear about it just to prove it, just know that it's you can approve on behalf of the customer, right? So you don't have to wait on them if they've given you the okay. So we have all these baked in workflows. And here's the great thing when I approve something. And sorry, I'm using a large screen so that, that's why I'm having to jump around once I approve something... at this point, it shows that it was approved. And then it actually takes effect to my budget.

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

REINHARD

32:30 So I can see exactly that there is an indicator that there was a change to my budget and what I've changed and you can see that there's an asterix above the number that was changed. So I can clearly see that, yes, there was a, there was a change order mark to this particular item. There is an asterix, and I can hover over that and see what the previous value is and what the new value is. A, is the key is that change orders that are still in flux that are still waiting on submit on approval from the customer, they're not gonna impact your budget. Only the ones that are been approved, internal change orders are approved immediately.

FIVE

33:10 Because...

REINHARD

33:11 They don't need the approval from the customer and they are impacting your budget right away. So that's a very quick high level overview of change orders. Is that makes sense? Conceptual?

FIVE

33:22 Yes. Yeah, that's good to.

REINHARD

33:25 Let's go to the web. So now I've got change orders and again, they can happen throughout the life cycle of the project, wherever they happen. You have the ability to track those things. But now I'm like, hey, work is starting to happen. So let me just actually pretend that I, you know... a emission and I've captured some items. This may take a little bit just so, you know.

LAUREN

33:51 While you're doing that, I do wanna let you know that we are at 20 till the top of the hour, which is how long we had budgeted but I think the team would certainly like to see whip.

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

REINHARD

34:04 Yep. So on the web and by the way, just so you know, we try to be as real time as possible sometimes these scripts and just so you know, we're in the early adopter phase right now. So I have about 32 customers that are actively trying this out on their live projects and we're getting feedback and we're fine tuning it just so you know, so.

--- ST app contracts and pricing ---

REINHARD

34:30 But we're going to be as close as real time as possible for you to then see as you can see here, I have changes and they're going to be reflected here very shortly. But as I'm making these changes, this is the performance page. This is the web page. You can see the system is gonna keep track of everything I care about on the project. You have the general information at the top about like this job where it's at who the owner is, blah blah blah, all that good stuff. And then I have my cost information which essentially is everything that I've budgeted for like here's my budget here's. How much I've incurred. We even break down your materials and your labor and your labor hours separately from all the other ones. Because we heard those are the most important things for people that they manage when they manage a project. We also have your revenue, what is expected versus what is invoice already, what the estimated margin is versus what? Then the actual margin is as stuff is happening. And then you have all of the stuff that you would expect to see. And then by the way, just some fine tuning items that you will see change a like this long description of the service. We're gonna trunk truncate that a little bit. And you can still see the full as you hover over it. But we're gonna make that a little bit cleaner. But in here, you can see the original budget. If there were any change orders, you will see those change orders reflected what the revised budget is. If you have any materials that are committed in cost, meaning you put in a purchase order against any of these items, you would wanna see what is the total committed cost meaning cost that is already committed.

IPHONE

36:12 It...

REINHARD

36:12 Via purchase order, but has not yet been received, you will be able to see that. So your team can make live decisions on what is happening. You can see what has been incurred per each in the middle individual line item. And then of course, the expected revenue. And then what you have invoiced against that to your earlier.

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

FIVE

36:30 To go directly out of there.

REINHARD

36:33 I'm sorry?

FIVE

36:34 Can we create the peo, out of the system? A purchase order for something out of the?

REINHARD

36:39 You can create a purchase order within the overall service rate experience as part of partsledger which will then reflect in here. So you have to answer the question. Yes, it's possible. It would just be a different experience still within the service rate.

FIVE

36:56 Automatically, there wouldn't be a manual input.

REINHARD

36:58 Right. It would, as you put in that purchase order, it is then reflected as a total incurred cost until you receive that item. So... and then of course, you asked me earlier like, hey, how do I see stuff by like if I wanted to drill that into labor?

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

REINHARD

37:14 So I change my view from service specific to item type. Item types are what we define as like to your specific body of like buckets of budgets if you will. So parts, labor equipment, all that stuff. So you can see that for labor, I have a total estimate of 28,760 dollars... for a particular service. I mean, for a particular, for that particular section. And then I can track as to how I'm actually tracking against just labor specific in current. The other beauty is that I have the concept of viewing dollars versus quantity. So I can see a especially for labor like what was my budgeted quantity versus what were some of the change orders? What is my incurred quantity? All of that good stuff. So I can see all of that. Let's see if we have. So here, you can see that it was probably available even before that. But because of me adding some used on dates to some of these items, you can see that the system is not tracking like, hey, you have incurred already these cost items. So it keeps track where I've incurred some cost. And it also shows me my percent to budget. So if that goes over the 20,208 that was budgeted, it's gonna go into red and it's gonna give me a low indicator that I should probably pay attention to that. And then of course, as you start to have incurrences against your item types that were of materials, you would see that same thing. So it keeps track and it kinda shows you the progression of here's what you planned. And here's how much you use against?

FIVE

39:05 I had a question, what if it goes, if the costs go over the budget? Is there any kind of alert that can be sent out or anything like that?

REINHARD

39:12 Yeah, we will have number one, the individual item will be flagged and there will be a caution icon if you will. And then we're also working on subsequent work to essentially have some kind of communication going to the project owner. So again within the system, you will have permission settings to say here's who owns the project.

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

REINHARD

39:34 So that's the primary person that's responsible for that. And they will receive a notification of sorts to say, like, hey, this went over, right? I, we're still defining the details as to how much we were are gonna show to the customer, I mean to the user, but there will be a notification of sorts to say, like, hey, here's something that you probably should pay attention to.

--- ST app contracts and pricing ---

REINHARD

39:57 I know we don't have time to get into this, but we're only talking about a project specific whip we have on the latter part of this year on our road map is you gonna have an organizational or what I call an organizational whip, which allows you to say show me all of these projects together and show me how I'm tracking on cash flow, cost, invoicing, expect a revenue, all of that good stuff. So it's pretty powerful stuff where you can see your entire body of projects and how you're actually performing one of the biggest things that is important in service contracting, especially in the project management world is especially nowadays might I add when it comes to a cash flow, like you wanna be able to predict better, what is your cash flow proposition? How much cost do I have coming in that I need to be prepared for versus how much revenue can apply against that cost. So I can now better manage like if you have a top paying customer, you might want to rearrange something and make them a priority of, you know, in a situation where you need to bring more revenue in more quickly. So there's more than time later on this year that allows you to see not just the individual whip which you have right now in production but also the holistic whip of let me select a number of projects for a period of time or for whatever. And let me see what that trend looks like, right?

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

REINHARD

41:27 So we have some pretty cool stop coming in that regard. I, one thing that I wanted to show you as well to kind of bring you back to the customer communication side of things. I'm gonna show you what I call a prototype. We're actively working on this and this is going to be delivered to production to all of our customers in April. So this is just around the corner. This is what we call service link. So now the work has started and they're like I'd like to know what is going on but I don't wanna always have to call Andy or somebody from his team. I just want to have a place where I can view that similar to the quote, you define what you wanna share with your customer as part of an interface that you will have.

--- Deficiencies ---

REINHARD

42:10 And then they can drill that into. I wanna see my appointments here's. What's going on or, hey, I wanna see they found some deficiencies, what are the, what is the information about the deficiency? They can see all of that as long as you say, yes, I want them to see that.

--- Access to information ---

REINHARD

42:25 Why is that important to you? Can minimize the time that you're spending on the phone with your customers. They have real time self service access to any of this data that you want to share with them. You just have to share that link with them once. And then they have it, they can see any of the attachments that were captured.

--- Deficiencies ---

REINHARD

42:45 They can see any of the comments that your technicians have captured here's. An awesome thing. We're also adding a timeline view where they can sequentially see what is happening. When did the technician come out? What did they do? What do they capture at what time was that done?

--- ST app contracts and pricing ---

REINHARD

43:02 All of that they can see, and they can track along to see what heck is going on any given projects. You can also share that with your subcontractors if they're doing something for you in terms of like managing the project along and all of that. So pretty powerful stuff. And again, this is just around the corner coming in April... but all of that together is your complete suite of how you from the beginning interact with your customer, how you track, how you define your budget to make sure that everybody is aligned and everybody understands what the fixed fee is, what your fixed cost is, and then making sure that people actually track to them. One little nugget that I also wanted to show you. We have this project percentage complete. It's a manual input on purpose because we want to better understand how our customers want to use that. But think along the line of when you get into Progress billing, when you get into invoicing, that could be a very cool thing that you can start to do is what if you said, hey, when we get to 50 percent, I'm gonna have business rules defining the account settings or when the project gets to 50 percent, we're gonna charge a customer XYZ dollars. So all of that allows you to kinda invoke now more efficient workflows as you manage those projects. And it's also a tool for your project managers to kinda keep track of like how are we doing? And what does this all look like in terms of that particular project?

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

REINHARD

44:34 And what we've heard from a lot of these customer discussions that we have on an ongoing basis is that it's so much all over the place that we just didn't wanna again box anyone in into our way of thinking and we just kinda wanted to leave it free form for now. But just know that as we learn more, this is going to become a little more sophisticated.

FIVE

44:54 Okay.

REINHARD

44:56 All right. I feel like I based a lot of project management. I hope that makes sense. There's a lot more detail here, but this is my Lauren, I'm flying 10,000 feet. I'm not going up. So this is the best I can do. I hope that answered a lot of your questions.

--- ST app contracts and pricing ---

LAUREN

45:11 Any questions for an?

FIVE

45:16 Oil we get into job costing? Sorry, what was that? No questions until we get into job costing?

REINHARD

45:28 What specific question on that?

IPHONE

45:37 She...

FIVE

45:38 Asked the question. Well?

FIVE

45:39 We haven't really gotten into the job costing thing yet. I'm curious to see how the costs get in there. And... then what sort of output we can get... from what I'm seeing on your project management. It looks like you've got it all in there. But... what can we get out on a?

FIVE

46:03 On a report for?

46:04 Management at the end of the day, when the project is done, is it gonna show us what we need?

--- Implementation and ongoing support ---

REINHARD

46:13 Yeah. So I mean here's where you would have all the data reflected. So as work is happening and as things are incurred, you will see all the data in here. The other thing that actually, I think next week we're deploying into our data warehouse from our data warehouse, anything that happens on a project.

--- ST app contracts and pricing ---

REINHARD

46:33 So any of the materials, any of the movement as it relates to things that happen within the project itself, you can even like customize specific reports that your management staff would want to see. So you're not confined to just what you're seeing here. You can create more detail with graphs, type specific reporting structures.

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

REINHARD

46:53 So that's maybe something that Lauren might have on the or Rick on the schedule to kinda demonstrate to you as well. But a lot of our customers that have to present like customized reporting and maybe it's a little bit more sophisticated, take advantage of that because you can create some pretty powerful things that speaks specifically to how you want to communicate to your management staff because I can tell you from experience, we're working with both large and medium sized customers.

--- ST app contracts and pricing ---

REINHARD

47:21 There is some very specific sophisticated type of reporting that maybe their executive staff is expecting that's where we recommend you take advantage of that data warehouse and really also the ability to structure more comprehensive and more maybe detailed or more specific flavors of this web. So you have that at your exposal as well.

TANYA

47:45 Okay.

LAUREN

47:48 And Reinhard is right. I do have planned a bit later, some sort of management level reports less granular than what Reinhard just walk through here, but we'll touch on that a little bit later when we talk about contracts.

FIVE

48:06 All right. Well, we got the dispatch side here. We've got Nathan over here on this side of me. I'm gonna move over to and dispatch.

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

IPHONE

48:14 To...

FIVE

48:15 Be able to ask their questions on the side.

IPHONE

48:19 We'll come back.

REINHARD

48:23 Meeting you guys again if there's more specific questions even as it relates to that costing, I can build out different scenarios, more comprehensive scenarios, but pleasure meeting you. And I hope the rest of your day goes well.

--- Access to information ---

LAUREN

48:40 You...

RICK

48:41 Thank you.

LAUREN

48:43 All right. It is my time to shine? I will be, I'll be discussing scheduling and dispatching views and service trades. I'm gonna go ahead.

REINHARD

48:55 And...

LAUREN

48:56 Share my screen. Who did you say that we have up in the hot seat that I could see there?

FIVE

49:04 I'm Bonnie.

LAUREN

49:05 Hi, Bonnie. Hi.

RICK

49:07 Right.

FIVE

49:09 Yup. All right.

RICK

49:10 Hi, Nathan bunny.

FIVE

49:12 Hey, go. Can you all see my screen? Okay. Yup.

FIVE

49:16 Good.

LAUREN

49:17 Perfect. All right. We're gonna spend our time in the office view service trade. This may be a refresher for some of you. I'm gonna start with our main dashboard which is what the administrative users in service trade would see when they log in.

--- Access to information ends ---

LAUREN

49:38 And then I'm gonna pull up a few different scheduling views to allow you to see how you would schedule. So I like to call this.

IPHONE

49:47 Board.

LAUREN

49:48 Like home base when you log in that shows you the status of different work orders to help you see the daily schedule which is obviously the first bucket here. And this can be filtered by what you wanna see by clicking this little filter button in the top, right? I've got a few different filters selected for different offices. So I had some data to show you based on what I know about your company, you may want to filter your dashboard by your service group and your project group to kinda distinguish between the two groups and maybe what you wanna see.

--- Type of work ---

LAUREN

50:28 But of course, there's lots of ways that you can filter by technician by type of work, whether it's service or project or even more granular really like the specific service line. So the plumbing etcetera... you're also gonna be able to see overdue work. My understanding is that you guys do a fair amount of planned maintenance.

--- *Recurring maintenance* ---

LAUREN

50:52 Is that true? Yes. Okay. So this is sort of a catch all for that kind of work that you've contracted to provide to your clients that like a by a specific date also applies well for like committed project work that you've got to do by date. And this will show you anything that's past due.

--- *Recurring maintenance ends* ---

LAUREN

51:10 So you can be proactive about getting it back on the calendar, same idea. Jobs without appointments do in the next two weeks. This is anything that's upcoming where the due date is quickly approaching.

FIVE

51:26 I, it's also where.

LAUREN

51:28 Or client service requests will show up on this main dashboard.

--- *Customer engagement* ---

LAUREN

51:33 If for instance, they're going through like your client portal on your website and requesting service and saying I need service today. Those service requests will show up here in the jobs it out appointments to in the next couple of weeks. Okay. Questions about that so far. Not yet.

--- *Customer engagement ends* ---

LAUREN

51:53 Okay. The last two buckets, I think it's worth showing but may not apply to the scheduling team as much, but it's nice to kinda have an understanding what it is past jobs to be mark complete. This is really anything that the text have finished in the field that requires review in the office. From a scheduling perspective. It may be nice to be able to know that on this column here, excuse me, in this column here where it says all work done, you'll be able to see if the text didn't indicate that they finished all of the services or tasks that they were there to perform, and you'd be able to click into that job, see what they did or didn't finish, and then schedule a follow up appointment for that. Finally, the bottom bucket is completed. Jobs be invoice. This is exactly what it sounds like. This is something that's been completed by the tech reviewed by the office. And then mark is ready to be invoiced and sent over to accounting. We've got a whole accounting block planned later. So we'll touch on that a bit more then. So this is the main dashboard. Any questions about that before I show you a few of our scheduling views?

FIVE

53:05 Overdue jobs with appointments because when we drop ours, we drop in for the month at a time. So you're talking a couple of 100 jobs. Does that... can you like pop that out so you can actually see the whole thing or how does that or is that just yet?

LAUREN

53:24 You can. Yeah. So you can, you'd be able to kinda see everything. And there's also a few different views for that exact purpose, which is actually any where I was headed to.

FIVE

53:37 Okay. Let me pull that.

LAUREN

53:43 Well, I was gonna pull up this scheduling view. I'm wondering if you think it would be valuable to see how I set up a maintenance like one that might happen every quarter. Do you think that would be interesting to see for sure? Yeah. All right. Let me do that. Then. I'm gonna pick... let's pick this woodbridge winery here as our example. I'm gonna make sure that it's in, it's an active location. Let me fix that. Really quick. Somebody went in and made some changes to my demo account. And some of my favorite locations have since been marked inactive.

--- *Recurring maintenance* ---

FIVE

54:23 No, here we go.

LAUREN

54:25 There we go. All right. So, in service trade when you're setting...

FIVE

54:31 Up?

LAUREN

54:31 A maintenance, those would be considered services can be a one time like repair or project or it can be a recurring maintenance. Those services can be tied to a specific piece of equipment.

--- *Assets* ---

LAUREN

54:46 We call those assets. If I went in here and added an, a rooftop unit, we could say it's on the roof unit. Number one type is... rooftop units. We can put in a manufacturer. You don't have to fill out a ton of this stuff. And chances are someone else is going to be doing that data collection when you're earning that customer in the first place.

--- Recurring maintenance ---

LAUREN

55:13 But then you can assign a maintenance to that piece of equipment. You can create templates for common types of services that you perform. So I'm gonna say a quarterly preventive maintenance... each quarterly maintenance that we provide as a service has this description. You can assign a preferred tech if it's the same tech that lives in that area or services that customer on a regular basis.

--- ST app contracts and pricing ---

LAUREN

55:44 You can include an estimated price that's internal for prioritization from like a scheduling standpoint, you probably want to prioritize the higher dollar ones first on this calendar and then the lower dollar value ones later, the estimated duration will be your visual queue on how long to block. A lot of this information can be automatically added into service trade to.

--- Recurring maintenance ---

LAUREN

56:09 Once you've won that contract, I'm just kinda showing you this on the fly. And then we can say how large the service scheduling window. So, so you mentioned Bonnie, that we're generally dropping these maintenances for the entire month. So we've got a month to get to them. How often should the service occur every three months?

--- Parts management (inventory) ---

LAUREN

56:29 So you can get more granular than that. Of course, you can also add items usually associated with these types of services. So you can do your parts ordering a month or so ahead. So you can make sure you have the filters that you need and the bounce that you need, and the refrigerant that you need, et cetera.

--- Recurring maintenance ---

LAUREN

56:47 And then once I save that, what happens is I have the ability to come into this report called a service opportunities report and basically run a report that shows me.

FIVE

57:03 All...

LAUREN

57:03 Of the services or the available work that's do within this specific time period. So I run a search here's. Everything I have for my office that's due this month, I can click one and go down each one sort of by.

FIVE

57:20 Itself.

LAUREN

57:21 If you had a list of 100, that would be pretty time consuming. So there's also this bulk, create a checkbox up here.

IPHONE

57:30 Before you move.

LAUREN

57:30 Any questions about that?

FIVE

57:34 No.

LAUREN

57:37 Okay. All right. I'm gonna select... these two services. Now, think of this as like your bulk job creation. So you're basically taking this committed work and creating all the work orders at once.

IPHONE

57:53 We...

LAUREN

57:55 All we have to do is select the job type.

--- Recurring maintenance ends ---

LAUREN

57:58 You can select things like automatically assign a job to the preferred tech if they have a preferred time as well. It'll it will go ahead and schedule it. Otherwise, you'll have some work to do to actually assign out this work. So you can see here's all the work that we are creating those jobs for. And what happens is once you create those jobs, they show up in one of two places. I'm gonna show you the scheduling view that's probably less used but really valuable for planning out like a month or so in advance. We call that our map based scheduler and let me make sure I have some selected here. Okay? That looks good. And then of course, we can filter this just like the main dashboard by what we wanna see. Again, you can filter by estimated price, you can define regions. And then once I filter that... I can see all available.

IPHONE

59:04 Work.

LAUREN

59:05 Populated by these pins on the map and the different colors of the pins and the different icons on the pins give you a visual queue of a few different things. The colors represent the technician that's assigned to it. Anything that's gray means there's not a technician assigned. Anything with icons like this one appear in a scotch one. The little calendar reflects how many appointments have been scheduled. And then the head like the little faces there reflect how many technicians have been assigned. So it's really easy to drag and drop to the week view calendar below which you can scroll week to start pre, planning your week, so or your month rather. So I can drag this unassigned job over there in Utah to Friday at the top. And then I can select who the technician I want to complete that work. So I'll drag that over to Dan. If I needed to make a change, I can simply drag it to a different day. So this view as I was saying is probably more appropriate for planning out the work that, you know?

IPHONE

1:00:18 Is that coming like?

LAUREN

1:00:19 Your planned maintenance in your project?

TANYA

1:00:21 I work in?

FIVE

1:00:21 Such, can you see all of the job?

LAUREN

1:00:24 That Dan has assigned to him?

FIVE

1:00:26 For day you?

LAUREN

1:00:28 Yeah, yeah. Not from this view, but let me pull up the dispatch view. So this is the view that's probably better for the question you just asked as well as the better view for reacting to same day service calls. So let me Zoom out just a bit so you can see that a little better. Keep in mind since this is a demo account. I've got a lot of offices in here because I don't like people messing with my demo data as you've...

TANYA

1:00:59 I...

FIVE

1:01:01 What...

LAUREN

1:01:03 Is nice is you can filter by specific office and pull up just those technicians you wanna schedule for. If I wanted to see what Andrew was doing today, I'd be able to kinda see their swimming as some of my cohorts refer to it as of what he's scheduled to do today. So you can see he's got two two jobs for today at to Poland Dallas... questions about that.

--- Type of work ---

FIVE

1:01:35 What are those office groups they have up top there? Explain that again?

LAUREN

1:01:39 So, these are just, this is kind of how you decide how you want to break up your organization.

IPHONE

1:01:46 For our.

LAUREN

1:01:47 Demo account, we just have it based on sales person. Most companies I work with either have it broken out by type of work, either service, maintenance and project, or they break it out by like the service that you're providing, whether it's hvac, electrical, plumbing, et cetera. Okay? So you get to decide how you want to break up your business.

--- Type of work ends ---

FIVE

1:02:12 I click on it. It's pretty much just like a way to group up technicians.

TANYA

1:02:17 Yeah.

LAUREN

1:02:18 That's exactly right? Okay.

TANYA

1:02:20 Yeah.

FIVE

1:02:22 For us, we'd have one like for service one, for install, maybe one for controls. Can tech be in more than one office or are they just locked into that?

LAUREN

1:02:32 They can be in more than one, but you would have to select like a default one for them. Like the one they do most often because that office they're gonna show up in, on the dashboard, okay?

LAUREN

1:02:49 Do you wanna see how I would create a same day service?

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

IPHONE

1:02:52 This call?

LAUREN

1:02:53 Yes, please. Let me do that then. All right. So pretty easy. We've got this at a job button in the top left corner. If I click that, I have the ability to type in really whatever I want here. If it's the phone number of the customer, the address, the location itself... let me see what is it?

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

LAUREN

1:03:20 I'm gonna use core. Well, I was looking for a specific one but I might have... that same problem that I had before with somebody deactivating some of my stuff. Okay? So I've got woodbridge winery here. And then I can come in here and say what type of work it is you to decide upon setting up your service trade account, which of these job types apply to you?

--- *Type of work* ---

LAUREN

1:03:51 And you can, I mean we can do emergency service call. You can see there's like inspection, maintenance, like Installation, so you can decide what type of work it is. More often than not, this board is generally used for service calls. And then we can say we need service today.

--- Deficiencies ---

LAUREN

1:04:09 This is the time the customer called in here's. How long we're gonna block something is wrong. If you know, the asset that's math functioning. If the customer can tell you that, you can add that here more often than not. They're not gonna know. And then we can say what type of work it is, maybe the building is hot or something. So we're gonna to do that. It's back. And then we can say the description of service, diagnose and repair.

--- Deficiencies ends ---

TANYA

1:04:37 I think.

LAUREN

1:04:38 Missing something. Let's see. I think I'm missing something because I can tell it's not wanting me to... let's see there we go. I needed a contact. So you have to put a contact in there before you can save it. And then once I save that, it'll show up as an unassigned job that I can then drag and drop to whoever is free. I can tell that Lauren is pretty busy today. So she's probably not going to be the person that I assigned to this. But as I scroll, I'll be able to see who has a break in their schedule. It looks like Dorothy will be wrapped up with this job at 11 30. Please ignore that. It's in Phoenix and this is actually in California. And then we can drag and drop that to her calendar below. Any changes made to their schedule. The technicians schedule same day. Not only will they be notified, they'll get like a like an email saying, hey, there's been a change to your schedule like take a look at your appointment.

--- Tech On-site ---

LAUREN

1:05:45 It'll also automatically update on their mobile app... and then you're able to see when they've clocked into that job. So there was a job down here, forget who it was, but they had clocked into the job. So you'll be able to see how long they've been clocked in route, how long they've been clocked in on site and things like that.

--- Assets ---

FIVE

1:06:06 Okay. So you created that call. When you go into that call, does it tell you who created the call?

LAUREN

1:06:11 Yeah, because there are several of us.

FIVE

1:06:14 So, if I have a question on it, I need.

LAUREN

1:06:16 Know who? Yeah, you can definitely see history service that does a great job of tracking history related to the services that you're providing down to the specific work order or quote?

--- Assets ends ---

LAUREN

1:06:29 And if I come to the job history, I can see that Lauren created the job at this time here's, the time of the appointment and the length of the appointment and who was ultimately assigned to that job.

FIVE

1:06:42 Tells you who made the movements? Is that what I've seen?

LAUREN

1:06:45 Yeah, that's right. Perfect. How would that be helpful for you?

FIVE

1:06:50 Because sometimes our jobs will get moved and we don't know who moved them and we need to know why without because there's no words or anything in there saying why? And the text will ask us like, hey, what happened to this job? Well, I don't know. Let me go find it, you know. So.

LAUREN

1:07:06 Yeah.

FIVE

1:07:08 System doesn't really do any sort of tracking it. You have to like type it manually, type in the notes and then it just gets all lost. Yeah, have that history. It would be very helpful for us.

LAUREN

1:07:20 Nice.

IPHONE

1:07:21 Stop.

FIVE

1:07:22 Checking too.

LAUREN

1:07:24 Say that again.

FIVE

1:07:24 Self checking. So like, why did I move that there? That kind of thing?

LAUREN

1:07:28 Yeah, sorta like, yeah, like your own personal audit trail.

FIVE

1:07:32 Right. Yep. Yep.

RICK

1:07:35 For keeping your customer legit too with that history?

LAUREN

1:07:43 What other questions can I answer related to scheduling or dispatch and service train?

LAUREN

1:07:53 I can't think of any.

LAUREN

1:07:58 You think of?

TANYA

1:07:59 Any.

IPHONE

1:08:00 Do... you have a view that shows... we kinda started to hit the view that would show all the maintenance in a region?

--- *Recurring maintenance* ---

IPHONE

1:08:13 Do you have anything set up in your demo that would show all the maintenances for a specific region? Like how many total hours are there? How many total job sites are there?

LAUREN

1:08:30 Yeah... I don't know the best way to show you that we do have a lot of dashboards we have like native reporting and service trade where you can pull reports that say, show me all. Let me reset this. Show me all preventive maintenances that are due. I'm gonna pick a large window because I don't know what I have in here that are due between these dates for... Lauren office and the status is scheduled but not completed.

--- Recurring maintenance ends ---

LAUREN

1:09:09 And if I run a search, I'll be able to kinda see this brought back four results. So, so here's every all the maintenance that were due specific to Lawrence office, you can also define regions in service trade. I'm actually not sure the best way to report on that, but I suspect we could create like a dashboard similar to this or one I'm gonna show a little bit later on. That gives you the ability to run reports.

--- Recurring maintenance ---

IPHONE

1:09:40 Okay. And I'm guessing to sort by region is when you input the new maintenance agreement for said customer, there's must be a field that you say this customer is in northwest Seattle or that's right? Seattle or something like that?

LAUREN

1:10:01 That's right? Regions are a way for you to kind of configure your account in a way that aligns with how you track things in your business.

--- Recurring maintenance ends ---

LAUREN

1:10:12 So it's actually not something I have a lot of experience doing, but just like you said, like Seattle is not Seattle. You've got like up towards like mucklteo and Everett, and then you've got like south of Tacoma. So you can kinda define those different regions and actually kinda configure your schedule that way.

IPHONE

1:10:33 Okay. Okay. Thank you.

LAUREN

1:10:36 Of course.

IPHONE

1:10:37 And so there would be, is there a view that, so like on your map where you have your pinged job location? So we could Zoom in and go, I only want everything in west Seattle and we could define that there's you know, 10 maintenances in south like west Seattle, so that I could, if a guy got done early and he needed, he was in west Seattle and he'd even time to fill his day.

--- Access to information ---

IPHONE

1:11:07 And on a quick response, we could drill into west Seattle and see if we could fill the rest of his day.

LAUREN

1:11:15 Yeah, that you absolutely could do that. The other cool thing is that on the tech mobile app, they have the ability to see a map of all the work that's closest to them too. So, if they had a last... in their mobile app and pull up the map, let me see if I can mirror this to my screen. Really quickly. It's gonna show up over here. I think... that's my dog. He's the service trade mascot and they could say, I'm in San Jose here's. Something that's near by and we can go pick up that work too.

--- Access to information ends ---

IPHONE

1:11:59 Okay. So they, that's good that they could view it so they could get familiar with it and dispatch could go. Do you actually have... the ability to even get this started? Today is too big of a project to take on? That would be more wasteful than if we just didn't even start it that.

LAUREN

1:12:16 Yeah, absolutely. So there, there's a lot that you're gonna be able to see that and react accordingly.

IPHONE

1:12:22 Okay, awesome. Thank you. Of course.

LAUREN

1:12:29 All right. Well, I just did a time check and we are running a little bit behind of where we thought we'd be any last dispatch questions I can answer before we transition over to a conversation about the accounting integration between service trade and save.

FIVE

1:12:46 I don't have.

FIVE

1:12:46 Any good. Yeah, thank you.

FIVE

1:12:48 I think the, I see. Okay.

LAUREN

1:12:52 Well, let me know if you do, and we can always cover those in a follow up conversation. Do we have everyone we need for the accounting integration conversation? Andy?

FIVE

1:13:06 Got right.

FIVE

1:13:07 Here swapping now.

RICK

1:13:09 Thanks, Dave and be.

FIVE

1:13:10 Thank you. Thank you. Am I on your questions now?

IPHONE

1:13:14 Yeah, me.

FIVE

1:13:17 You started late?

FIVE

1:13:20 So, we got Terry coming back here for the accounting part. Hi, guys.

RICK

1:13:25 Hi, Terry.

FIVE

1:13:26 I'm bad.

RICK

1:13:32 Yeah. So, Terry, I think you probably have heard the introduction to Tanya who is director of our partnerships and accounting side. So she'll be able to talk to you on this part here.

--- *Accounting integrations* ---

TANYA

1:13:45 Great. Nice to meet you.

FIVE

1:13:47 Nice to meet you.

TANYA

1:13:48 Rick said, I'm the director of accounting partnerships, but prior to service trade, I spent pretty much my whole career selling accounting software, Sage in particular, Sage, intact, Sage, 103 100. And then during the last session, I took a break and was a controller at a mechanical contractor using Sage. So, very familiar with how, you know, a lot of your daily tasks are, and how they should best work with service trade. So, so you guys are using Quickbooks or right now and then evaluating intact. Is that what I understand or you guys migrated to impact?

FIVE

1:14:26 No, we are currently using Quickbooks?

TANYA

1:14:29 Okay. But looking at shifting or migrating to intact?

FIVE

1:14:34 Yes.

TANYA

1:14:35 Okay. Out of curiosity, who are you guys working with that with an intact? Are you working with a partner or intact directly?

FIVE

1:14:43 We're not yet.

IPHONE

1:14:45 You're not yet.

TANYA

1:14:46 You guys have not started to look at it?

FIVE

1:14:49 No, it's...

RICK

1:14:49 On like John might have talked with someone at a conference in the last meeting, but I'm not sure if he ever mentioned who.

FIVE

1:14:57 Well, because we have not successfully found a total ERP system that does everything that we needed to do. Now, we're looking at service trade in conjunction with, in this case, Sage and other service softwares in conjunction with whomever, whether it's Sage or another accounting package.

TANYA

1:15:27 Okay.

FIVE

1:15:28 Yeah. It's my current belief that service trade works best with Sage. Is that correct?

TANYA

1:15:38 We work very well with intact. We also work with a lot of other accounting products too. We have integrations with, you know, several different accounting products out there, not just intact, but that is one of our better ones, but mostly because intact API structure, it makes it very easier. They have a really nice platform to, you know, integrate our data with their data, but we do have, you know, integrations with other accounting packages out there.

FIVE

1:16:05 Okay. Well... my big deal in all of this is really two things. Okay. One, I don't want anybody to enter anything twice.

--- Invoicing ---

FIVE

1:16:19 If they're dealing with a piece of paper, I want to end it in one spot and I, I'm not really particular where they enter it, whether it's grade or Sage. Okay? But I want the two completely married so that... if my ap clerk enters an invoice... where does she enter it? And does she then get this ticket in the drawer? It has to be the information on that invoice for a piece of equipment or parts and supplies has to be somewhere in the job record. So that when the billing clerks attempt to send out an invoice to the customer, that information shows up so that we charge the customer properly.

--- Accounting integrations ---

FIVE

1:17:09 But I don't want her to have to turn around and enter it again in the accounting package... for doing payables runs.

TANYA

1:17:18 Right.

FIVE

1:17:20 And same thing as relates to payroll, seeing as you worked with Sage, does Sage actually perform payroll?

TANYA

1:17:31 Sage? Intact?

FIVE

1:17:33 Yes.

TANYA

1:17:35 From what I understand when I was, it's been two years since I've told that they have come out with a payroll module within the impact program that's just being released.

FIVE

1:17:48 Okay, great. Then. So the... in fact is the integration between service trade and Sage... single entry. I don't yeah, it's double entry, but single entry from the point of you put it here and it's communicated throughout.

TANYA

1:18:16 So there are there's a lot of touch points, you know, with stages new payroll just coming out... in speaking particular to impact intact as a lot of places to import data.

--- Accounting ---

TANYA

1:18:29 So with payroll because it's just come out, we sort of have waited on figuring out what we, where we're gonna do it, what we're gonna do with it. We work with a lot of different stage partners that give us guidance on best workflow... processes.

--- Tech time tracking ---

TANYA

1:18:44 And so the time, you know, you can put time into service trade and we would be able to pull that time out and import it into Sage. Therefore not having to re enter it, you know, with time a lot, most time you want to review it, it's not like a real time thing that somebody puts two hours in.

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

TANYA

1:19:00 We want to think over. Usually there's a review process. Somebody goes through approves it. Then once it's approved, we would, we'll be able to grab that time and bring it into Sage... with billing, you know, you'll we'll walkthrough the workflow of creating bills inside of service trade. And you'll see that those sync over to service trade with the purchasing workflow, we, you know, allow the user inside of service trade in our purchasing module, partsledger to create a po, that po, cost to hit the job and then receiving it through service trade as like the purchasing process.

--- Parts management (inventory) ---

TANYA

1:19:36 And then it's sent to Sage for the accounts payable invoice to match too. So we do have different workflows for the different like costing areas, labor the material cost. So that if you do you guys do any inventory?

FIVE

1:19:51 No, we should have that ability going forward but we're not.

TANYA

1:19:56 Okay. So we can handle inventory. So if you are tracking inventory in our system, you know, text are saying I use this. I use that it will add the cost to the job. And then it can pass over journal entries to Sage to say, you know, deplete inventory, move this to cost of sales. And so really service trade becomes your detailed sub ledger. But all of the transactions and the general ledger are tracked inside of Sage.

FIVE

1:20:26 Okay. So then if I hear you correctly, if we... enter a purchase order into service trade and then receive the invoice and acknowledge the receipt of the materials and the cost that automatically transmits or through a posting routine at the very worst transmits into Sage, creating the accounts payable line item.

--- *Accounting* ---

FIVE

1:20:58 For then check processing.

TANYA

1:21:00 Correct.

FIVE

1:21:01 Good. Okay. And... as technicians are putting time to particular dispatches or work orders, what whatever your system calls them, are those hours accumulated and transmitted into Sage?

TANYA

1:21:24 They are accumulated and then they can be, that part is gonna be transmitted through an import into stage of the time here's.

--- *Invoicing* ---

TANYA

1:21:31 You know, all the hours you know, be the broken out to jobs or, you know, depending on how your accounting is set up. So you can be brought into stage for payroll processing.

FIVE

1:21:41 Okay. Okay. Well, great. Then... it sounds like we don't actually have to enter anything twice that I'm hearing. Now. Does the service trade? Is that where you would create an invoice to send to a customer?

--- Invoicing ends ---

TANYA

1:22:05 It is. Yeah, let me share my... screen. All right. Are you guys seeing?

FIVE

1:22:16 Yes.

TANYA

1:22:17 Okay.

REINHARD

1:22:18 So...

TANYA

1:22:22 Sort of high level here with some different touch points where you can see most things are pushing from service trade to stage. You know, here's. Is kind of a, there's a couple of different workflows.

--- Accounting ---

TANYA

1:22:35 You know, some of this is really what you get into an implementation of, you know, who is the, what we like to call the record of truth for say, customers and locations? Do customers have to, you know, do you want them to start inside of Sage... or can they start inside of service trade? And so if a new customer is created, then we have like a location, that service location. So, jersey Mike's headquarters. But then jersey Mike's the local store. And then we say, hey, now we're gonna create a job to go do a repair or maintenance at that store. Then when we create that job, it will, it can sync over and create the customer inside of intact, the contact inside of impact and also a job if you choose to.

--- Invoicing ---

FIVE

1:23:21 Okay.

TANYA

1:23:21 Great. Then work is done. Then the job is invoiced at that point, when the job is invoiced, it syncs over and creates a, what we call inside of Sage, a sales order invoice that then can be posted either come over as posted or come over as draft mode for you to post there's. Lots of little configurations that you can do. But essentially, that's the workflow.

FIVE

1:23:45 Got it. I love it. That's...

FIVE

1:23:47 It looks like it syncs when the invoice is sent so that it looks like there's no, certainly we have like a posting thing. We have to, we have to click this button, then it posts all the invoices to Quickbooks. It looks like in this system, as soon as it gets sent to the customer, it's already in Sage or just.

TANYA

1:24:06 There is a button you do click because you may want to review it. So when we're in the invoices, so let me just go create a quick one here. So I'll show you the workflow. It's mine... get my jersey Mike's here. So I don't know how much a service trade you've seen but this is the, so I'm here.

--- Accounting ---

TANYA

1:24:30 Let me back up here. I'm here on the highest level. So here's my jersey Mike's headquarters, this little chain link thing. This is the external system. So this is how it knows where it should go inside of impact. So it knows that this is the matching impact customer and that gets connected. When you, if you create a brand new customer right now, it would go. And if the workflow was to then create an impact, it would go create impact, would assign an impact ID and then it would come back and write that ID into this field. So they're always like connected... then good. Then underneath the jersey, Mike's headquarters or our customer, we have different locations we service. And so those are these different locations and those also can be connected depending upon how you decide to set it up. But they also have a connection that here's that particular customer ID. So everything's always connected one to one. Then I get my, on this particular screen, I see all of my details about this particular location. You know, all the jobs that we've done for them. So if I go look at this particular job here, this one that I had set up, it also has synced over to impact. I can tell because of that thing. And here's the impact job number it created. So it uses our job number but it puts an st in front of it. So then when you're an intact and you're looking at a list of jobs there may be. Do you guys do any Construction or are you all service?

--- Type of work ---

FIVE

1:26:00 Okay.

TANYA

1:26:02 So I find a lot of times, you know, if you've got larger Construction jobs now, Ryan heart was showing us that project management for those Construction work, you may do some of that Construction work, but you may, do you guys do like, you know, year long large 1,000,000 dollar projects or is everything more?

--- Accounting ---

FIVE

1:26:18 Yes, yes.

TANYA

1:26:20 So those projects would probably live an impact of their own job numbers that you would do things like Aia billing through. So you may have some different sequence of job numbers, but you'd always be able to identify these are service trade initiated jobs because they've got the st in front of them.

--- Invoicing ---

TANYA

1:26:39 Gotcha. Okay back to service trade here. So then when I complete the job, you know, we can send out that service link to the customer. It, we can create our invoice. And I have an invoice here that I just did. So it creates my invoice. It also, it sends it over and it, when it sends it over to Sage, it marks this process. So I'd be able to see my whole status of my workflow that the invoice was sent when it was sent over, that it was updated. Because when I have a new invoice, let me just do one real quick here. I'll just copy this one here. I will say, I'm gonna invoice this job. I'll create my invoice. So as a user, there's different statuses the invoice can have.

IPHONE

1:27:34 Maybe you want someone.

TANYA

1:27:35 To review these invoices before they get sent to accounting to do a final approval. But there is a button that says send to accounting. So a user could finish their invoice, send the invoice to the customer, then they could send it to accounting. So when I click the send to accounting, this is where it's gonna submit it to Sage. It marks it as pending accounting. So once Sage has received, it sends it back and says that it's been processed and it will update the status. Now, I can do this like one at a time. I create the invoice, I send it to accounting or there is a screen where we can like maybe somebody is gonna do a review of all of them and they review all the invoices and they can grab a whole batch of invoices and click send to accounting and send off, you know, maybe 30 invoices is one time to sync over. So it's user preference. And now it says processed. So I know it's gone over to Sage and then process. So I see the step here... and I like the history too because as I send this invoice link to my customer and this is the, this is what the customer's going to receive.

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

TANYA

1:28:46 Is this invoice? Now, you can choose just like mine heart was showing us on the quote. You could choose having details, you're gonna show your invoice but I like the service details that I can click on. And that shows me like that whole report of pictures and notes and recommendations all in one place.

--- Invoicing ---

TANYA

1:29:07 So the customer gets this invoice and they know exactly what they're being billed for. So once I've sent that invoice out, then it will even add it in this log showing that I sent the invoice who opened it when it was open. So which can be very helpful as we know when you're dealing with collections.

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

TANYA

1:29:25 So now they actually got the invoice that it just has never been opened, that maybe the email address is wrong, and that's why I've not.

FIVE

1:29:32 Okay. Very good. Now, if we scoot over to purchasing and we've I take it in service trade, we'll create a po for a job that already exists. Then... we receive that... what is the... what is the process?

TANYA

1:30:05 So, in service trade, we're really just like we're going to create the po. Then when the, as you said, when the po received that's when we'll update that the materials are in. So we can go ahead and schedule the work. And then that pushes over this shipment receipt details over to intact with intact, calls a purchase receiver, which is all the details of what was received.

--- Invoicing ---

TANYA

1:30:29 So then when the accounts payable invoice comes in with the ap with the invoice number and the date we can match to that. And it'll just intact converts that receiver into the accounts payable invoice with all the details that came over from ServiceTrade.

FIVE

1:30:47 Yeah. But what happened to the price on the invoice, when did you put that in?

--- ST app contracts and pricing ---

TANYA

1:30:53 The, the cost of the materials you mean? Or the price of the?

FIVE

1:30:58 Yeah, the cost of the materials, it, you've sent out a purchase order and, you know, you spent roughly 300 bucks, so that's lovely. And the material arrived. Okay? That's great. Now, we can go to the job.

--- Pricing ---

TANYA

1:31:16 The...

FIVE

1:31:17 Next thing that happens is we get an invoice for that material. And, yeah, the part was 297 and the shipping was 15 bucks. Now you're over 300, right? So you're at 312.

TANYA

1:31:35 Okay.

FIVE

1:31:37 So, how does that 312 dollars get reflected in service trade? Which is where the billing department is going to charge the customer?

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

TANYA

1:31:49 So, when there is a discrepancy, you would need to come back and update the shipment receipt or service trade to reflect that, to let that information, then push, if there is that dramatic of a difference, you know, addressing that? Because if you'd base things off of that shipment receipt or that purchase order, and, you know, was it out of, was it incorrect? Was, you know, do you have a discrepancy with the vendor that needs to be resolved? So you may need to go back to service trade and say, let me fix this so that I can then push that information back over to intact. So it correctly reflects the correct shipment receipt?

--- Invoicing ---

FIVE

1:32:27 So, when you get the invoice, if you update the pricing in service trade, does it then push the invoice number and the purchase price, the total invoice amount into Sage?

TANYA

1:32:45 Update in service trade, then it will push that back over to intact with the correct information.

FIVE

1:32:50 And in service trade, is there a place where you... update the purchase order to include an invoice?

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

TANYA

1:32:58 Number?

TANYA

1:33:03 Like that, you mean like the accounts payable invoice number? Not really. I mean, really when we're saying when the shipment has been received, that's I guess what are you looking to do? Are you looking to reference the accounts payable invoice number or?

FIVE

1:33:19 Yes, the customer or not, the customer, the vendor has assigned an invoice number?

TANYA

1:33:25 Sure. To.

FIVE

1:33:26 Correspond to our purchase order.

TANYA

1:33:28 Okay.

FIVE

1:33:30 And if my payable clerk is going to match up a packing slip and an invoice, then she's gonna go into service trade and either approve the pricing that's in there or update it.

TANYA

1:33:48 Huh.

FIVE

1:33:51 And then that's gonna go over to Sage intact and she shouldn't have to do anything beyond that... until I call for checks... right?

TANYA

1:34:08 So, it could be that you treat the shipment receipt phase as really like the accounts payable invoice receipt, that details coming in as like, you know, what comes in here as the shipment receipt is really the final numbers, not that we're just sort of receiving and said, yeah, yeah, I got that. And then we'll wait to get the ap, that really, the shipment receipt is like the final check to say, yes, we got six and it was three dollars. We got four and it's not two dollars. It's 275 and you're making those updates so that what comes over from the shipment receipts like the final thing, then it will be ready for accounts payable.

FIVE

1:34:49 Exactly. And... as that comes over, does it include the vendors invoice? Number?

TANYA

1:35:05 It does not... it does not because it's wanting to the current workflow, is that you would add that when you're in Sage, that you would convert the purchase receiver into an ap invoice.

FIVE

1:35:22 Great. Okay. Well, that actually causes a second entry based on that same in.

--- Tech time tracking ---

TANYA

1:35:38 Just adding the additional information, but, yeah.

FIVE

1:35:43 Yes. Okay.

FIVE

1:35:49 Let's have I run all the time? Yep, I've run out of time. So, let's see fast and dirty payroll... is time tracking for virtually all employees handled in service trade and then transmitted to Sage?

TANYA

1:36:17 Would really just be employees related to doing work on the service trade jobs would be, we would be tracked through service trade.

FIVE

1:36:25 Okay. So, administrative personnel and office personnel, their... time tracking and so forth would be all handled in Sage.

TANYA

1:36:39 I would think, yes, yes, but not through service trade because there's not really a place to put administrative or office time into service trade.

FIVE

1:36:48 Okay. So, but service trade is going to track all billable personnel and then it's going to have some method for transmitting those hours per body into a payroll system.

TANYA

1:37:06 Right. So we have like on this, let me back up to a job back to my job here. So, this particular job has got some labor added to it. She put four hours of time on there. So we can take these four hours out and, you know, send them over. They could be, you know, just general time that, you know, overtime is calculated in stage or you can have different types of labor, regular labor over time, labor that then it can go to the right place.

FIVE

1:37:39 And does that transmit if you will as the technician closes out of the job?

TANYA

1:37:47 No, it's not gonna be, it's gonna, it's not gonna be real time. It's gonna be an import so that at the end of the week, it could be reviewed, maybe somebody else, you know, maybe a supervisor approve time and then that final time is what we would bring in to say. We would look to bring in to Sage.

--- Implementation and ongoing support ---

FIVE

1:38:03 I see. Okay.

FIVE

1:38:10 Well, I see a service manager standing here waiting for his allotted time, which started 15 minutes ago. So I, thank you.

TANYA

1:38:22 Sure, Terry did.

RICK

1:38:23 You have any other?

TANYA

1:38:24 Sure. If something else comes up, happy to hop on as you guys start to get through your accounting review process, if there's other products you guys decide to look at definitely let us know.

--- Implementation and ongoing support ends ---

TANYA

1:38:34 Because we do, we have lots of customers that use all sorts of different, you know, Construction ERP solutions that we do have integrations with.

FIVE

1:38:44 Very good. Well, at this juncture, I would say that we would be glad to look at. I'm gonna say your top three... if Sage is at the top. Well, that's great. I've never worked with Sage, but... and just a brief moment of background, I was at one place for 28 years whose computer system didn't change in 28 years.

TANYA

1:39:16 So...

FIVE

1:39:17 It's... my exposure to what's out there today is new.

TANYA

1:39:25 Gotcha.

FIVE

1:39:26 So, if you can say, give me your top three recommendations that I can then have a quick overview of, you know, I can go and take a look at their products and see what they've got. Yeah, that would be great. I'd appreciate that.

TANYA

1:39:43 I can do that.

FIVE

1:39:45 Very good then. Thank you much. And I'll let.

IPHONE

1:39:49 Step in here, sir.

RICK

1:39:51 Thank you, Terry.

TANYA

1:39:52 Thanks, Terry.

FIVE

1:39:54 Than that was a good overview.

IPHONE

1:39:56 All right.

FIVE

1:39:59 I'm back Jim. Hey, and one of the questions is you actually that?

RICK

1:40:04 You...

FIVE

1:40:05 One of my questions you just covered because one thing we've been doing before like I said, before, I used Salesforce and Asia and some of those other softwares before.

--- Tech time tracking ---

FIVE

1:40:17 And one thing I was gonna ask was about time approvals because I see that that's something. You know, everybody has their own opinion on... it. Is it good to do a time approval at the end of the week to make sure that our time sheets are accurate? It depends on what you talk to.

--- Tech time tracking ends ---

FIVE

1:40:34 All of those other software solutions. Have that. And so, you know, just to make sure that we're invoicing properly and able to capture... appropriate labor against appropriate jobs prior to hitting the accounting software and then flowing out somewhere else, it's a huge thing because I see the potential for, to be high if it, just if a blast passed us and I'm like what happened? You know, I gotta catch the.

--- Tech On-site ---

IPHONE

1:40:59 Right, right. I mean.

TANYA

1:41:03 I don't know how, you know, if you've seen how service trade like the tech can arrive on site, they clock in, they clock out. So the tech can just keep it simple that they're just saying I was here for this long. I left at this time.

--- Tech time tracking ---

TANYA

1:41:15 And then as you guys are reviewing the job and you see that those clock events that they were there for two hours and 23 minutes, somebody can say, what is this?

What is this to the customer? Is this, am I billing the customer for two hours? Am I billing this customer for our minimum of four hours? But then also what cost am I saying that they were there for payroll purposes? So it allows the tech to be kept simple and easy here. I left, but then me to sit down and say, I'm gonna review that time and I'm gonna make the decision. It's sort of like the start of the approval process.

--- Tech time tracking ends ---

FIVE

1:41:50 No, that makes sense because you do tend to find and we do a review here that's very comprehensive but sometimes it's it can be... stuff that we could have caught initially in a time sheet approval. May, you know, we're catching in an invoice review process. So it may streamline some of that stuff and, you know, transition through there because there's been plenty of time. So you say text on the job. He's in and out and that's all I care about text in and out. And then I look back and I don't man, you know, that should have taken them six hours a take three, you know? So how are we going to address that with a customer versus trying to catch that in the invoice thing?

--- ST app contracts and pricing ---

FIVE

1:42:26 We can already start to see those timesheet approvals in the initial process that allows us to cost against service contracts and PM contracts and everything, which what we're leading to as well making sure that I'm tracking hours consumed versus, you know, our sold and, you know, able to balance that margin across my contracts and, you know, and build the business base off of that contract base and, you know, kind of transition there.

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

FIVE

1:42:50 So point. So yeah, I wanna see from the service and sales side, PM contract side. So our PM sales person is not here. He's out till today, but I've handled.

RICK

1:43:01 Hello, man, David, right?

FIVE

1:43:04 Yep. Yep. David's out hill. So he's so, but I've handled enough to understand where we need to go and, you know, I used to do my own contracting prior to this. So, so I think I've got a list of a couple of questions that he may have and some things that we can work through as well too. So.

LAUREN

1:43:20 This is my show again, I think what my recommendation was gonna be... relating to... service sales and things like that. Was, I've got a deck I'm planning to run through today with some screenshots and videos of how our sales contract management product works. And then we actually do a live demo every Tuesday and Thursday with the product expert for context. There is one product expert at service rate because this is a product that we just acquired.

--- *Purchase decision* ---

FIVE

1:44:01 And...

LAUREN

1:44:01 We're we're working on getting the sales team up to speed, but I certainly know enough to be dangerous and what I have to show you today is certainly super detailed and I may be able to answer some of your questions. But since especially... since David's not here might wanna consider signing up for him for one of those.

--- *Purchase decision ends* ---

FIVE

1:44:26 No, no, definitely. We do want to do that as well.

FIVE

1:44:29 At the website for that or.

LAUREN

1:44:33 So we have a link that we can send you or even sign David up, you know, by ourselves. So we can do either. Okay. So let me do this let.

RICK

1:44:44 With them on that too to kinda, you know, intro that or kind of coordinate that with David.

FIVE

1:44:50 Yeah, no, it'd be good, you know. So we're kind of transitioning things as we go through, you know, from the service side and the contract side. Those two things run hand in hand. And so, you know, I always like to be in the know of what checks that the contract guys are writing for me to have to cash later if you get that point, you know. So we, we're working closely together to make sure that, you know, we're in line and, you know, we can handle the labor and we've got that stuff. So that's good totally for it. So, yep. So.

LAUREN

1:45:25 All right. I will try not to death by powerpoint. You, there's plenty of opportunities for Q and a throughout, but I'm gonna go through and full disclosure. This is my first time going through this deck, not by myself. So I hope I represent it well.

IPHONE

1:45:44 So we've heard.

LAUREN

1:45:45 From, no, I'm not gonna do that. So we invested in a product called Northboundary because there was a need from lots of mechanical contractors to grow their sales engine. And it's sort of a difficult challenge to overcome because there's lots of challenges in this business today. Are you having a hard time finding and training reps that can build these service sales proposals because it's highly skilled and highly technical equipment? Are you building those proposals now with like word or excel docs? Is that difficult to track? Like, do you even have the visibility of what you're your team is selling? It sounds like that may be an area of an area of pain for you. If you are using some of those manual processes. Is it easy to overlook important pricing details that may affect your margins and things like that? With Northboundary, which is a tightly integrated piece of our service trade platform. We bring to the table 30 plus years of experience and templates built into the app so that it's easy for more people to build proposals. All of the processes to build proposals and manage your pipeline are automated. So your selling team is spending less time building those proposals and you've gotten more visibility and control of the pipeline.

--- *Customer engagement* ---

LAUREN

1:47:18 And it's really easy for your team to capture equipment details including labor material costs, like tasking, drive time, everything, every data point that you need to make sure that you're never missing your target margin. We've got case studies as well of our customers that are using this, the service sales product that are saying they've grown their maintenance contracts 50 percent in about a year because they were able to sell such high value service agreements and execute them efficiently with service trade.

--- *Customer engagement ends* ---

LAUREN

1:47:57 And they really only had to grow their technician team by 10 percent to deliver on the sales. So here's how you'll be able to build a sales engine like that using our Northboundary product. So first you'll have a comprehensive maintenance proposal builder that will help you do everything from surveys to signatures, not to compete too much with what Reinhard showed earlier. But we also have project proposal builders for those bigger one time scopes of work that you may have preferences on how you do that. Today. We don't have to go through this in Northboundary in this deck, but it's nice to know that you can do it in either place depending on your preference and.

--- *Type of work* ---

FIVE

1:48:46 I see that being like we're just funny. We were just downstairs talking about like small scope service jobs, you know, a repair that's a little bit more than you know, it's a five or six day repair. It's a 10 day repair. I think that's the prime example of where the, that would work for that versus a Construction job that would be the project management side. So.

--- Type of work ends ---

LAUREN

1:49:10 Yeah, there's a high likelihood that you'll pick a little from column and column be depending on what it is. And then the third way you'll be able to kinda execute on growing your sales engine is having complete visibility of the pipeline with those sales automation capabilities. So we're gonna start by talking about the maintenance proposals since I know that's a hot button issue.

--- Customer engagement ---

LAUREN

1:49:34 And then we'll go into the project and then the pipeline stuff. So let's say you've got the opportunity to build a proposal to maintain a customers are to use. Now, building that maintenance proposal all starts by collecting equipment data. And I wanna show you how easy it is for you to have really anyone go out to that information.

--- Assets ---

LAUREN

1:49:59 So let's say they're on the roof and they're going to be able to collect all the details by using an OCR scanner, for instance, to pull the model number from the name plate, and it'll automatically input into the system. So they don't even have to do any keying in. It just kinda captures that information. It only take about 10 to 15 minutes depending on how many arts we're kinda walking around and surveying to capture that information that your team needs back in the office to start building the proposal? Is this something that you've implemented today? Are you going out and doing surveys and capturing like model number, serial number, tonage belts, filters, that kind of stuff and some kind of format?

--- Accounting integrations ---

FIVE

1:50:47 We are, we are, I mean, a lot of that stuff is tracked, you know, right now, we input through, you know, an excel based... workbook that then will integrate. And I don't know the data entry into ESC, how that happens. But as far as what we have right now on the contract side initially, in the beginning, yep, we're capturing the model number, serial number.

--- Accounting integrations ends ---

FIVE

1:51:07 But again, it's just like you just said, it's an excel sheet that we've done these things with. And so there is some, there's some potential for erroneous data. There's potential for some corruption. There is some potential for that stuff. But also, you're just talking about the task. You know, I've been on job sites where I've got, you know, 250 rooftop units that we want to bring into this contract. So I can see how that might be a little stream went a little bit, so.

--- Assets ---

LAUREN

1:51:33 Well, I don't think that 250 units is gonna take 10 to 15.

FIVE

1:51:37 Got...

LAUREN

1:51:38 To...

FIVE

1:51:39 Yeah.

LAUREN

1:51:42 Something like that. Okay. Well, it sounds like this would certainly be faster than that. Well, so, so your team will be able to capture that information. And then back in the office, your team is gonna see all the details about the rooftop units that your team captured right away. And as you'll be able to see here, your team could have imported that list of rooftop units too, like if they did go into a spreadsheet or enter the manual ally. But in this case, since we just use the OCR, all they have to do is take those model numbers capture in the field and use the model library that will automatically put all the information about this model, like the manufacturer and all the other specs... into the application.

--- Assets ends ---

LAUREN

1:52:31 Directly. And based on your account settings and the asset type, the seasonal tasking lists will automatically be set up that takes into account the tech level required to do that work.

FIVE

1:52:45 Yeah. No, that's that makes sense right there. Sorry, I said you, Jessica could put in there.

--- Accounting integrations ---

FIVE

1:52:55 It looks good because right now with our current product, ESC, there's an equipment list in there and if somebody wants to do it's, just get everything gets input manually. Like there's no import behind the scenes because I'm familiar with the database and the nitty gritty back there, but that's it's not very user friendly.

--- Implementation and ongoing support ---

LAUREN

1:53:14 Yeah. And we can talk about importing a bit later. I know we've got some time allotted to discuss like the onboarding with service trade and the account setup. So, but importing is definitely something that's pretty easy on a one off basis like this. If you've done a 10 hour survey of those 250 units for your entire customer database, yeah.

--- Forms ---

FIVE

1:53:36 Those tasks that you've been just showed in that little video. So you said you jump in there and you hit the manufacturer, right? You drop a model number and that takes you to a library. Is that library maintained by you guys? It is okay. So the out in the field basically, if I understand it correctly, they'll make it on the phone.

--- Assets ---

FIVE

1:53:55 This is the imports here or a tablet, whatever their own iPad, whatever it is imports here. And then once I get back in the office is where I actually do the integration of… the equipment to the, you know, I pull that equipment in there, the model number, serial number. And then that in turn gives me this task list right here.

--- ST app contracts and pricing ---

LAUREN

1:54:14 That's right? So, in this example, based on, you know, the type of equipment and what we, as the experts say that you should be doing, you can see you've got your tier a task, your tier a text the task, but you could just as easily set those tasks up so that you're sending out an apprentice to do things like the filter exchanges, and.

FIVE

1:54:39 Right. So, is that a, is that the grade of mechanic, or is that the skill level right there? That a, okay. Gotcha. Yeah. Gotcha. Now, one question before we move too far and you may cover if you're gonna cover it, just go ahead and tell me before it slips of mind. Is there a way right here with this customer to create entitlements? Let's say like, so go.

REINHARD

1:55:00 Like...

FIVE

1:55:01 Salesforce, every customer, you know, it might be a God customer that has different pricing. It might be a G sa, customer that has to be a certain, you know, is there a way to generate those entitlements in here for this specific?

LAUREN

1:55:16 I'm not familiar with the term in titlements and.

FIVE

1:55:19 Entitlements for let's say that based off of their contract and they're free negotiated labor rate or?

REINHARD

1:55:25 Or...

FIVE

1:55:26 Let's say in order to bid this contract, we, we're only allowed to charge, you know, five percent above cost for materials. You know, sometimes you get certain things when you're doing different types of contracts that are, and I always use the term contract entitlements because that's just basically, this contract is the only one that would apply to not every single contract that we do.

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

FIVE

1:55:47 So, is there a way to build that individual customer wise in there or is it just one set of parameters for all contracts? So.

LAUREN

1:55:54 I'm...

FIVE

1:55:55 Going...

LAUREN

1:55:55 To, I'm gonna defer to the experts before answering that question. I can't remember if that is a function of this product. Northboundary, my heart tells me it is.

--- ST app contracts and pricing ---

FIVE

1:56:10 It is.

LAUREN

1:56:11 Something that service trade natively can, do you've got customer specific pricing agreement. I just wanna confirm before I tell you, but I've 95 percent. I'm pretty sure I'm gonna make a quick note of that so I can follow up on that. And then I'll get back to my screen. Now, you were very, you did have the foresight that pricing was coming. I don't know that I'll answer that question when we get through the rest of the stuff, but we're basically at the point your team has captured all the details. Now we're moving onto the pricing conversation. So based on the information that's collected, Northboundary, will calculate the labor needed for each seasonal service filter about exchanges, etcetera, and that drive time and break it out by asset. And then you'll be able... to scroll and kinda see how all the labor is sort of cost it out and it'll turn that pricing, turn that into the pricing based on the plans that you offer. I believe this states here that it's that it is an account setting. So I think that's part of your entitlement question, but again, we'll confirm that, but of course, you're going to be able to see margin calculations as well and then easily override any of the sales price if you need to, for whatever reason.

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

FIVE

1:57:41 Can anybody override that sales price? Or is that something that, that's locked based off of user?

LAUREN

1:57:48 Check Rick, can you make a note of that please?

RICK

1:57:52 User rights, user rights gotcha?

LAUREN

1:57:55 Yep. So do you wanna see what an example proposal looks like?

FIVE

1:58:01 Definitely.

LAUREN

1:58:02 All right. Let me show you that.

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

LAUREN

1:58:04 So we're proposing a mechanical investment service proposal to get your tire. And... this is how your customers would actually review... and sign digitally. This proposed this proposal. So you can see here that there's a table of contents that your customer, your client will be able to review and it'll have a lot more detailed than what the team just put together.

--- Quote templates ---

LAUREN

1:58:36 And then it's easy to apply things like templates when putting together things like that. Sounds like you may have stuff that you've already templated. If you're using excel, I'm guessing you already have some other templates as well... and think of these templates and things sort of like lego blocks that you can like piece together to curate this master proposal. And since these proposals are basically word docs, you're they're easy to adjust on the fly as well. So if your customer goes in and clicks this start button here, they'll be able to it'll jump them to the agreement page, well, where they'll be able to sign and see things like the tasks that you're proposing your TS and CS, things like that, an inventory of the equipment that you're proposing that you service for them, the maintenance schedules, how often you're gonna be changing out these filters, what type of filter, things like that?

--- Assets ---

LAUREN

1:59:44 And even pictures that your team took of the equipment? And then of course, your complete tasking list. So, so everything related to this piece of equipment, it'll show all of that tasking, okay? For.

RICK

2:00:04 Each piece.

FIVE

2:00:05 Of...

RICK

2:00:05 Equipment or each.

FIVE

2:00:07 Type of equipment.

FIVE

2:00:10 Okay. So, like if I have right there package DX with gas, heat, that rooftop, you know, if I've got 50 of those, it's not going to be 50 of those things. They're just gonna be one package DX with gas, you know, exhaust fans. They may have four or five different types, but it may just be one block for exhaust fan, right?

LAUREN

2:00:26 I'd answer that question on the question. Are there ever instances where you may sell a full service maintenance on one piece of equipment, but not another?

FIVE

2:00:37 Sometimes, yes and no, it just depends on the situation. You know, you may go to a site. And I mean, again, I've been there and determined that... based off of this piece of equipment age and condition, we're going to exclude full coverage if you will on that one. And we're only going to do a time mature repairs, but that's another conversation. I think it would happen after. I just wanna make sure that we didn't have a whole, you know, it didn't turn into every piece of equipment you check on here. I've got, you know, a whole bunch of these checklists that now this thing is 60 pages long instead of 20. You know what I mean? That's all.

--- *Quote templates* ---

FIVE

2:01:13 Well, it sounds like what you're asking for. Is there a way to sort of customize this, how customizable looks like or lost in here? Like do we have control of editing each part of like everything on the page? And then do I also have control of like the rules that get used to initially build this proposal?

LAUREN

2:01:35 Yeah, since it does have the ability to, you do have the ability to create lots of templates and things. I, it would stand to reason that you'd be able to edit things as well.

TANYA

2:01:44 Okay.

RICK

2:01:45 I'm totally sorry. Did?

LAUREN

2:01:47 That's all right. So that's so fine. So that concludes our section on the maintenance proposals. We can pivot to the project proposals and kinda show you a few screen grabs of that. If there's no more questions about the maintenance proposals?

FIVE

2:02:08 No, it seems like the maintenance proposal goes out, pretty... seems like it makes sense the way it goes out. So I'm good with that.

--- *Quote templates ends* ---

FIVE

2:02:18 It seems to be pretty standard on a lot of that. But I like the fact that it's on the fly built versus having to come back and I spend a lot of time editing word, documents and stuff that I create.

LAUREN

2:02:29 Imagine.

FIVE

2:02:30 I...

LAUREN

2:02:32 Can imagine you are not alone.

--- Quote templates ---

LAUREN

2:02:35 Well, I'm sure you have the same headaches when it comes to those like big complex project proposals because this can certainly be a lot of work. So Northboundary also makes it easy to speed up that process. All your reps have to do is pick from your library of templates and they can drop whatever project templates into the proposal based on the scope of what you're doing.

--- ST app contracts and pricing ---

LAUREN

2:03:03 And you already said that you have templates and things like that. So, so those will be easy to put into Northboundary. The other capability that gives you a lot of flexibility here and how you build project proposal are worksheets. So on the left side of the screen, you can see how this project is set up with a hierarchy of scopes of work.

--- Quote templates ---

LAUREN

2:03:30 And each one of those scopes of work has a worksheet of parts and labor. And then any of these worksheets can be set up as an alternate, which means that it'll be optional for customers so they can opt in and out to different things that you're proposing. And then the worksheets will calculate the pricing based on the parts and labor requirements.

--- ST app contracts and pricing ---

LAUREN

2:03:52 And at any point you'll be able to see a total of all the pricing from all the worksheets. And then again, we'll check on the permission based setting, but you should be able to override the total sale price if you'd like.

FIVE

2:04:05 Okay. And on that, I saw margin earlier when we were looking at some of the projects and some of the other stuff. Is there a way to adjust based off this proposal? We use kind of a sliding scale on margin based off of the price of components and so on and so forth. So, is there a way to adjust that margin individually based off the part price?

LAUREN

2:04:32 I think so we'll confirm that. I know that's how it works in service trade, you can set up different like margin requirements for things between like a different range. So like anything between a dollar and 50 dollars is going to be.

FIVE

2:04:45 Got the access we use right now. Kinda like everybody does, you know, not gonna charge 30 percent margin on a 1,000,000 dollar chiller, right? Exactly?

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

LAUREN

2:04:54 Yeah, exactly. So we'll confirm that for you, but it would stand to reason that would operate that way. Perfect. Let's see what else we have here. So that's the project proposals. You think this might help your team for the bigger project proposals?

FIVE

2:05:13 You know, it looks even on the bigger side for some of the stuff that we're doing. I think that between this and what we have already in service straight, I think that we'll be in a good and a good place to be able to cover a lot of what we do. And again on the Construction side that, you know, refer to the boss that on because that's his realm. But having seen this and having used different software in different places that this is, looks like it's pretty robust in there. One question I have is, so on this service that?

RICK

2:05:47 Is there the ability...

FIVE

2:05:48 To add sub contractors or to build a subcontract out of this on a project? You know, even let's say a small, a vfd replacement, right? Like I see you've got in there. We've got a vfd that we're going to replace. Let's say, I need an electrical sub contractor to come in and do that high voltage electric work to the vfd. Is there a way to build that into this and cut a sub contract out of it? I guess this job?

LAUREN

2:06:13 I actually don't know the answer to that. So I will do some research and I will get back to you.

RICK

2:06:19 Uploaded it.

LAUREN

2:06:21 What, what's kind of a fun little piece of service trade history is that we got our start like 10 years ago in the kitchen exhaust, cleaning space of all places. And we like done well was the company that service trades were born out of our cto actually work there and designed service trades, ancestor product for the workflow of national accounts, like sending work to subs, and serving that out to different vendors throughout the nation. So service trade supports that I'm interested to find out how Northboundary also support that. So we'll get.

FIVE

2:07:00 Is Northboundary a cost increase on top of service trading itself?

LAUREN

2:07:06 It is, yeah, it is an additional module that is very tightly integrated with service trade, but it is an additional fee.

FIVE

2:07:15 If we do not have Northboundary, we can't control the contracts in this manner. Correct? Okay. Do they go hand in hand? I mean, is this something that will, you know? I guess we'll get into that when we get into a pricing conversation later on.

FIVE

2:07:34 I have a question about you said you've mentioned that it's tightly integrated some of the sales guys out on the roof capturing all these serial numbers and puts it in. Would that get into service trades asset list eventually? And?

LAUREN

2:07:47 Yeah, absolutely. That's...

RICK

2:07:48 A question. Yeah.

LAUREN

2:07:50 That's actually where I'm going now. So let me come to the sales ops side of things of this deck. I promise we're done. But.

FIVE

2:08:00 You asking you all these good question. I mean, this is all good data. So, yeah, yeah, yeah.

LAUREN

2:08:04 And then, and there's a slide down a few more down about the, that's good about moving info from Northboundary into service trade once you win that deal. So this is like your sales dashboard. Once your reps trap those maintenance or project proposals and opportunity is automatically created, that means you'll be able to track and manage the entire sales life cycle for your service and project deals. And then your reps will have an interface that makes it really easy for them to manage their opportunities. Each of these tiles is considered like a deal. And all you have to do similar to the scheduling views of service trade, you might remember is drag and drop to move them through the funnel. You can mark a deal is lost and indicate the reason in this case, we're gonna pick competition because maybe psf sold is customer... that's not gonna happen if you have Northboundary though. And then also whenever you win an opportunity, you can sync all the customer information, equipment, information, service frequencies and that pricing information straight into service trade. And literally all you do is click a button. So the coordinators won't have to do any double entry. So it's pretty quick and painless.

FIVE

2:09:24 Okay. Actually, like that. And like if you click now in this tile view right here that you're at. And this is like, so this is going to be an individual person.

RICK

2:09:35 Pipeline.

FIVE

2:09:36 Pipeline, right? So this is, if I'm the sales rep, this is mine right here, correct?

LAUREN

2:09:40 That's right?

RICK

2:09:41 Sales.

FIVE

2:09:42 Manager view.

LAUREN

2:09:44 It's like you read my mind, assuming your opportunities have been properly managed by your sales team and you'll be able to open up the sales manager dashboard to see sort of the state of the union. So you'll see things like in the top left for the given time period, you can see totals for everything that's closed or is forecasted. You'll be able to see like a sales leader board like who's performing better? As you can see there a summary of like pre pipeline prospecting activity, and then like a summary of pipeline by stage that will enable you to go in and see all the deals in the, these stages.

FIVE

2:10:30 Okay. So now, outside of sales right here, you know, we're at the point where it's sold, we know we've lost what we've closed, what's been dead, what's been stolen, all that good stuff. Now, contract performance, can you see that in here?

LAUREN

2:10:48 Yes. So what I have pulled up here are two different reports.

--- ST app contracts and pricing ---

LAUREN

2:10:55 This is a slightly different reporting view, but you're able to see sort of a margin break out. A, this is anonymized data. So it looks kinda funny with like company name and then all the sites you service for that company, but you'll be able to see the gross margin for each of those customers and sites and things like that as well as sort of an overall view of the company gross margin based on what you've contracted and what you've actually performed. And then of course, you can see things by date. There seems to be a cyclical nature to the mechanical space because of the hot and cold seasons. So you'd be able to review that. And then there's also the ability to review the performance of a specific contract. So like pricing agreement or contract and measure that performance against the expected revenue and the actual revenue.

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

FIVE

2:11:49 And where does this right here exist this quick site? What you're looking at right now? Does this exist in the northern the Northboundary or is that in sales or service trade?

LAUREN

2:11:59 It's just, it's something that Reinhard alluded to earlier. It's just a different dashboard. Okay. That, that's there's really there's a lot of native views for like some managers in service trade, like you can pull a quote or like jobs report like we did earlier.

--- Implementation and ongoing support ---

LAUREN

2:12:18 And then from an overall company health standpoint, quick site is sorta the, our preferred reporting functionality that helps visualize things like at the high level of like how your company is performing, how your contracts performing, what's your?

FIVE

2:12:40 Kind of taking?

RICK

2:12:41 Those like the BI.

FIVE

2:12:43 Right. You know, and in putting it there is that we're talking about like I used to use PowerBI that's right to look at this dashboard now, is this quick site? Is this an addition as well?

--- Pricing ---

LAUREN

2:12:54 It's just included in our enterprise subscription.

RICK

2:12:57 Okay. Now.

FIVE

2:12:58 The, the question I've got from there is the data. Well, two is gonna be twofold. So right here, if I look over there, and I see that contract on the bottom was performing at negative 30 point four percent. Can I click on that? And is it take somewhere?

--- Quoting ---

LAUREN

2:13:14 You should be...

FIVE

2:13:14 Able to?

LAUREN

2:13:15 My demo rig doesn't allow you to do that. Let me pull over a different dashboard and...

RICK

2:13:22 Jump right into that.

FIVE

2:13:23 Be like, no, what happened?

LAUREN

2:13:26 Here's a different reporting view. Since KPI'S are interesting to you. Again, it's anonymized data, but you can see like revenue by job type, biggest open deals.

--- ST app contracts and pricing ---

LAUREN

2:13:37 I'm gonna scroll down to the bottom of this. You can see things like revenue distribution by customer and see the margin per customer. And if I were to click one of these, I'm gonna pick this one here because our overall margin for that customer is about 50 56 percent.

--- Quoting ---

LAUREN

2:13:52 It'll update this report to show me all of the data up above specific to that one customer, what's the biggest open quotes for that customer? What's our quote approval rate for that?

FIVE

2:14:03 That's a big one. Because I...

RICK

2:14:05 I have a customer.

FIVE

2:14:05 It's a high pay off but their approval rate is five percent.

--- Quoting ends ---

FIVE

2:14:08 Yeah, I have another customer that approves 99 percent of them yet. Were, you know, they're just smaller jobs and so in turn, at the end of the year, they both equal each other. They balance out. So that's a good point. Now, the other side of that, was that data in the one you just showed me the first version of this that had the by contract right there.

--- Tech time tracking ---

FIVE

2:14:30 How does that data get to quick site? Is that a manual entry? Or is that just come over by? Yeah, how's it get there?

FIVE

2:14:38 The data live real time?

LAUREN

2:14:42 Yeah. So it's not super real time. I think it updates every four hours, but through our API is how this gets updated. So you won't have to manually update anything but it'll update. Most people are looking at this on like a daily basis or weekly basis on their management meetings and it'll update every four hours. So you'll be able to see, you know, everything.

FIVE

2:15:05 Quick site can update it every four hours.

--- Tech time tracking ends ---

LAUREN

2:15:08 That's right?

RICK

2:15:10 You, you?

FIVE

2:15:11 Got you. Got me right there. That's the best thing. So, the problem I had with PowerBI, was we used it for a while coming out of Salesforce, and we didn't realize that there was no integration. So we're like man, we are running consistently at 30 percent margin man. And then it was static data that nobody knew we had to update a push. And so then we manually push and everything's tanked because, you know, a cost to that job is great. Yeah, but awesome. Thank you for. That makes a ton of sense. So.

LAUREN

2:15:40 Of course. Well, I think that's most of what I had to go through as far as the Northboundary and the sales process goes. What other questions can we answer about that before we transition to the last little bit about onboarding and questions about that?

FIVE

2:15:59 I think we're good for me on the contract side. Is there a way that you can send me... a, just a contract out of there? Can you like email me one so I can look at it? And also is there a way for us to add like within that contract? You know, we're really hitting hard lately especially with the, you know, the state of the economy and stuff on inclusions and exclusions because, you know, we want to be able to have the custom, you know, expectation management, you know, and everybody talks about being fair and equitable to the customer. And, but, you know, at the same time being fair and equal us to make sure that we're all protected. So, is there a way that you can email me and copy that contract just so I can look at and paper?

LAUREN

2:16:43 Yeah, I'll write that in my next steps right now.

FIVE

2:16:46 Perfect. I like, I just like to see touch read highlight in one of those, right? I like the data but also like the word, the piece of paper that I can look at, write on.

LAUREN

2:16:57 Yeah, it makes sense. I mean, you don't get into this industry by not being good with your hands and wanting to touch things. You all are a bunch of technal learners. I get it.

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

FIVE

2:17:08 Yeah, absolutely. So, so I think that's good for me. We answered the ability to track contract probability. We answer, produce a contract presented built entered and then the demo of contract management. I think that I am good on that. And the last thing is billing on contracts that's the other question I had. So from a contract, is there a way to generate whether it be quarterly milestone billings? Is there a way, you know, if it's a monthly billing to the customers like that, does that, do we have control? Do they launch automatically or do we have to manually release billings you?

--- *Accounting integrations* ---

LAUREN

2:17:50 Yeah. So, great question. That actually is a function of service trade. I'm not quite sure how it interacts with Sage intact or other accounting systems. So we can put a pin in that side of things for Terry later. But service trade certainly has the concept of what we call recurring invoices.

--- *Recurring maintenance* ---

LAUREN

2:18:12 I'm not sure if that's something that comes over when you sell the agreement Rick maybe you can make a note of that. But when you set up a recurring invoice in service trade, you can determine how often that invoice should occur, whether it's monthly quarterly etcetera. And then you basically pull a report that says show me all the invoices... for January or from April, and then you run a report, bulk create those invoices and then put the.

--- *Recurring maintenance ends* ---

FIVE

2:18:47 Okay. That makes sense. I guess I'm just getting into that mind instead of thinking about, you know, fire and forget on some.

REINHARD

2:18:54 Some contracts?

FIVE

2:18:55 Right. You know, I mean, like they're launched in, they're signed, they're good to go. We're doing the work generation because I have had it in the end where at the end of the year, I realized we have an invoice to customer for their quarter. They're just hanging out, not here but, you know, they just hanging out like, hey, this is great. And all of a sudden the end, the ear Lance here's four invoices for all four quarters. Sorry guys, you know, they're not ever going to call you and say you didn't charge me.

--- ST app contracts and pricing ---

LAUREN

2:19:18 You know, I think that too sometimes but my best customers are like, hey, we just added some users out there.

FIVE

2:19:28 There are, there are quite a few. So, yeah, I just put, you know, making sure that we're you know, there's the accountability portion of it to for us because I like to know, you know, I see a margin tank or something like that. I'd like to know where it happened, how it happened and be able to, you know, adjust that like, you know, we got caught in the contract thing about it being the contract in itself being autonomous, but it's not, it has to be monitored and pulse and stuff, you know, am I setting the wrong tech out there each time and we're eating hours. And I like that. Now, one more question about contracts. This is what I'm done. This is just for me. Is there a way to see off that contract? If we have a certain amount of hours, is there a way to see how many hours have been utilized against that contract?

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

LAUREN

2:20:07 I think so. Let me do some, let me do some confirming on that. I believe there's a way to do it. I just, I don't think my report shows that, but let me confirm for you.

FIVE

2:20:18 Okay, perfect. That's it. Thanks.

IPHONE

2:20:20 On the invoicing and saying, yeah, is there a way to regenerate, say all the invoices for the month of March and place them on hold so that they could then be attached, the service report and send them out one at a time as the work was completed?

--- Recurring maintenance ---

LAUREN

2:20:45 How do you mean?

IPHONE

2:20:48 Like right now, let's say if I have 50 maintenances due for March, I'll pre, generate that the service contract pre, generate the invoices because we've already told the system that this customer gets billed in March and then we put them all. They're all placed on hold until the work is done.

--- Tech On-site ---

IPHONE

2:21:11 We don't pre invoice until after the work is completed. Because if something happens and we couldn't make it for whatever reason, you know, COVID hit, you know, if things get shut down, you don't want to automatically keep invoicing customers or whatnot. So we only invoice after the work has been performed.

--- Tech On-site ends ---

IPHONE

2:21:33 So, can I place those on hold? Because then now maybe 10 of those have to be uploaded to one portal. Another has to be uploaded to another customers portal. And then a handful have to be emailed.

LAUREN

2:21:48 Are you saying, are you saying you do a lot of third party work for you're? Having to submit invoice... how much our, do you all do?

--- Accounting integrations ---

IPHONE

2:21:59 Well, we do some third party work, but some of our customers have their own portals. They use coupa, they use Kareo... whatnot. So we do a lot of portal work. So I have to save the invoice to a PDF, upload it to a portal?

LAUREN

2:22:20 Yeah.

IPHONE

2:22:20 I'm not just emailing it directly out of the software... some of those customers are gonna get monthly invoices.

--- Invoicing ---

IPHONE

2:22:29 Some of them are gonna get biannual invoices. It all depends on their specific site.

LAUREN

2:22:40 Yeah. I think there's multiple ways you can do that depending on your customers preferences. I think the workflow that we see most commonly is that I don't know if we're kinda still on the topic of sending out invoices for maintenances or not. But most of the work that gets performed in service trade, you're basically billing after it's been done like and it's sort of a one off invoice. And the recurring invoices is just a small piece of what our customers do and you'll have the ability to create those invoices but decide when they actually get sent to the customer.

--- Invoicing ends ---

IPHONE

2:23:26 Okay. That's what I want to make sure we have control of... when they are sent to the customer.

LAUREN

2:23:33 Yeah. Yeah. You should be able to have autonomy. I can't think of a reason why an invoice would just automatically send. So I don't think that's a concern. I do wanna dig a little bit more into the third party work. Like what percent of your revenue do you feel comes from these customers that have their own portals?

IPHONE

2:24:02 It seems like every day it's growing right now, it's small, but one of our customers is a very huge, well, a couple of them every single. I mean, I'd have to, I'd have to think about how to figure out the actual percentage.

LAUREN

2:24:21 Yeah.

IPHONE

2:24:23 I would say at least 25 percent right now.

FIVE

2:24:27 I was gonna say the same thing and it eds, and flows. Sometimes we're seeing that it might be because of the amount of work done at that location, it might be 50 percent of the invoices for that month and then it may trickle off. So, so there is a lot. And even in my previous company where I came from, we did, Kareo was a big one that, you know, the dog cage system was a big one that you have to input manually. You know, there's no where to email an invoice to. You have to upload it to their portal. So there's a potential for.

--- Customer engagement ---

LAUREN

2:24:58 Yeah. I think fundamentally, let me just kinda share my philosophy on that type of work service trade. Obviously operationally is gonna help you with a lot of stuff like everything from the scheduling to the service agreements, to the reporting etcetera, where we're not gonna really shine in excel is helping you deliver better service to these customer portals.

--- *Accounting integrations* ---

LAUREN

2:25:29 We have some integration with like service channel, for instance, it's a pretty expensive integration, but we've done it before. I do want to just, you know, be completely transparent with you making your communication with your third party portals is an important mean.

IPHONE

2:25:52 No, no, that wasn't it. I just want basically, I want to have control of my invoices.

--- *Accounting integrations ends* ---

FIVE

2:25:58 Okay. Yeah.

IPHONE

2:25:59 All of them, of what data I can add to them, and when I can submit them to the customer and how I can submit them to the customer, whether that's through the software through an email or like a separate email, through outlook, not through the software or through a portal.

LAUREN

2:26:21 Okay. Understood. Yeah. Well.

IPHONE

2:26:24 Cause every customer is different.

LAUREN

2:26:27 Yes, I still.

IPHONE

2:26:28 Have snail mail customers too. So.

RICK

2:26:32 No fact I...

FIVE

2:26:34 Well, we...

FIVE

2:26:36 Install we use.

RICK

2:26:38 Yeah.

FIVE

2:26:41 Alright. Thank you guys for the contract thing. You can answer a lot of my questions and I'll be able to articulate this to David and set up another time for us to be involved in because I think that from the contract to the service side, those things go hand in hand and I don't think they can, I don't think they can exist in back in outside of each other. So we'll probably do a lot of this together because, you know, again, he's writing the checks that I got to cash, you know?

LAUREN

2:27:07 We can follow up with you separately. I think the weekly demos of that product, the live demos are on Tuesdays at 10 pacific and Thursdays at nine pacific. So we'll send you more information on that, send you a day then.

FIVE

2:27:22 Okay, perfect. Thank you guys so much.

LAUREN

2:27:25 Of course. I got a time, but I did prepare to go through onboarding questions, expectations and I've got a price proposal to share with you all as well. Do you still have time for that?

FIVE

2:27:38 I have time for it here. If you guys do as well.

--- *Implementation and ongoing support* ---

LAUREN

2:27:43 I'll give you to the top of the hour and then I need some lunch.

LAUREN

2:27:51 Cool. Let me do this? Let me pull over my links for that. Okay?

LAUREN

2:28:06 I have a deck here. This is actually a deck I kinda repurpose. This is actually from a kickoff call that we did with one of our customers and I really kinda just, oops, I don't wanna do that. I really just kinda wanted to show you since there were questions about what the project manager does. I thought the easiest way was just to kinda walk you through what a new customer, what their expectations would be. So you you'd have once we kinda handed you off from the sales team over to the customer success team, we'd have a kickoff call in which I would introduce you to your project manager, who would be sort of the overseeing your entire implementation.

--- Implementation and ongoing support ends ---

LAUREN

2:28:51 With the help of your team. They would be working with an implementation consultant who helps with all of your data, importing that into service trade et cetera. Occasionally we'll have onboarding engineers for products in addition to our core application like Northboundary, for instance, or our parts in inventory management piece as well.

--- Implementation and ongoing support ---

LAUREN

2:29:16 And then the managers of that team, we'll kinda outline and work with you of what are your success parameters, what are you really excited about? How can you track your Progress and things like that? And then there's like five main stages, the introduction and the initiation stage of the onboarding process, the planning stage in which we'll start working on getting your data into our hands into your service trade account and setting everything up and kind of your roll out vision of like when you want to be live things like that. And basically all this kinda happens like sort of at the same time but in short little phases. And we'll actually give you access to a dashboard that kind of tracks you along that journey. So it's very task driven. You'll be able to see how long you have left in your service delivery window, which tasks still needs to be managed? Like have you sent all your data? Have you reviewed all your data, etcetera, there's things like status updates that your project manager might send to kinda keep everyone on the same page. And you'll also be able to see, I'm gonna hover my mouse over here under the certification section. You'll be able to see your team's completion of our online training courses. So your onboarding is both self service.

TANYA

2:31:00 In a way.

LAUREN

2:31:00 Where you get access to our training courses and the subsequent quizzes associated with those. And that would be your entire team, your tax, your office etcetera. And then there's also one on one time where you're gonna meet with your project manager on a weekly basis, kinda address these tasks on this dashboard and things like that. Any questions about?

--- Implementation and ongoing support ends ---

FIVE

2:31:25 No, that looks really good. That's something that I struggled with in our previous suffer implementation was the lack of the style of dashboard, just emails going back and forth and excel project plan with there's a lot of empty boxes to fill in but all the details are just sort of missing. Yeah.

--- Implementation and ongoing support ---

LAUREN

2:31:44 Yeah, we're definitely technology obvious and don't challenge us to create a dashboard because we will... which is exactly what we did to help with these implementation. So here's just a sample of survey start from an implementation that we did... for a site that had multiple products they were implementing at the same time. The data gathering period always starts before the service windows. So we can start getting a peek at the data, things like that work on the certifications. And then there's like process mapping. There's. Probably gonna be some integration pieces that will work in there, but you'll have a really smart dedicated project manager who's seasoned, kinda helping you through this process.

--- Implementation and ongoing support ends ---

FIVE

2:32:33 Okay. The spot on any of these things where it first lists out the tasks and who's who owns that task like it. But here's a list of tasks and this is what five star has to do here's. A list of tasks and this is what ServiceTrade is gonna do.

--- Implementation and ongoing support ---

LAUREN

2:32:47 Yeah, that task management will happen through the journey dashboard. So, yeah, it'll give you like homework and then they sorta like a son, I don't know if you're familiar with a sauna or any other like project management tools, but you can assign tasks to different folks as well. Okay. Yeah. Let's do it all. So that's sort of your onboarding journey from soup to nuts. So you got basically all these different phases.

TANYA

2:33:19 Where we're...

LAUREN

2:33:20 Working in all the different steps of the implementation. And then once you've trained your text, the last group that you train in your organization are the technicians since the, their stuff super easy. And you can basically learn it in less than a couple of hours. Once you go live, you'll be introduced to your account manager. And then you'll have ongoing support from our account management team to make sure that you're using service trade in a way that it's intended and best practices and things like that.

--- Accounting ---

LAUREN

2:33:58 Okay. I think there was some questions about data as well. We can import a lot of data. And I pulled up this page in our service trade account here, the bulk import page because we have a lot of templates. We can import your customer lists and all the sites that you service for them.

--- Assets ---

LAUREN

2:34:23 We call this companies and locations. So there's a location import template. There's an asset import template just like you saw, you can import assets into Northboundary, it can also be done in service trade. So there's like different templates for the types of equipment, RT, package, units, et cetera.

--- Recurring maintenance ---

LAUREN

2:34:40 Recurring services can be imported, which are those like maintenances that you've contracted to provide your pricing list and your items list, and even things like tax groups. I know where you guys are in taxes for litter word. So, so with that what you will, but yeah, so there's a lot of there's a lot of templates, but these are the heavy hitters, the locations, the assets, the recurring services, and the prices.

--- Accounting ---

FIVE

2:35:11 Okay. Yeah, it looks good. And another thing is I've always wanted to try to not do is leave any data behind a lot of a lot of these discussions. There's always, we support importing this data but not that and I think, is there a spot where this is like fully documented like say for the location import, is there a list that shows all the every single field and it's data type that?

--- Accounting ends ---

LAUREN

2:35:39 Yeah, you can actually see... if I download this, I might be able to pull it up there's. Also a, on our here. Oops. So on this template, you don't have to fill out every field but you can, but there's one thing that really doesn't come over that some people ask about a like service history. We don't retroactively create a bunch of jobs that have happened in the past. So that's the one thing that generally doesn't get imported except in super rare circumstances. But there's sort of all the fields that you can. You don't have to fill out. The other thing that I was gonna mention was if I come back over here, this is going to be a little teaser into our pricing discussion.

--- Accounting ---

LAUREN

2:36:36 On our... statement of work order. There is a data requirements page and a professional services page. Isn't that opening. Let's see... is that, well, if this link was working, there it goes... this talk about the data format requirements, the type of data that can be imported and things like that. So it's pretty well documented. Does this answer your question somewhat?

--- Forms ---

FIVE

2:37:19 A little bit. I was more looking for like just like you showed me that one template with all the empty fields, but it's just empty boxes. I need to know what format of data I can put in there, the system will ingest without airing out on me. And then also if there's like say a larger piece of data like maybe an attachment or we start in our current system is ESC, this is and a lot of the notes in there or just free form text.

--- Forms ends ---

FIVE

2:37:49 So that I don't want to leave those notes behind. So to put notes, I see the comments there, but it doesn't support line, breaks multi line text data because if it does, is it be a big run on sentence that goes on forever? Yeah.

LAUREN

2:38:05 I see what you mean.

--- Implementation and ongoing support ---

LAUREN

2:38:08 What we may wanna do. I have a feeling we're gonna need subsequent conversations anyway. I might bring one of my onboarding specialists on a call for you to answer some of those questions or for them to answer some of those questions for you because I just simply don't know.

--- Implementation and ongoing support ends ---

FIVE

2:38:26 That was fine. That's fine.

LAUREN

2:38:29 A lot of data is not one of them.

FIVE

2:38:31 Gotcha. That was that's totally fine. I anticipated we would probably need to do a follow up on that like another general type question that's just about API access. And I know you mentioned, you know, certain things are imported, certain things aren't... but if there's an API where we can import it on our own, is that something that exists service history?

--- Accounting integrations ---

FIVE

2:38:59 Like, could I use that API to import service history on my own if I had to?

LAUREN

2:39:04 Yeah. Our apis are open and publicly documented and you can Google it and you will find it.

--- Accounting integrations ends ---

LAUREN

2:39:15 And all, the only requirement to using this is our premium subscription level and you guys will be enterprise anyway. So, so, yeah, have added.

FIVE

2:39:27 Okay. If I just click on one of those in there, like how about... it's? So job, but what is, like, what does the job look like? Okay... I was just looking for something about attachments. Is there anything about attachments there?

LAUREN

2:39:49 I can do one of these queries...

FIVE

2:39:57 A URL to Amazon Aws. Okay. So I think that be a question I would have and a follow up question is say you're going too far, there is all that red text up there that's where we're putting the attachment in there.

--- Accounting integrations ---

FIVE

2:40:11 So it looks like it takes an attachment, a wave file. And in our case, it would mainly be PDF and maybe JPG. So like pictures, that big question I have is if I put it on Aws like that and make this API call, is it actually putting the data in service trades database?

--- Accounting integrations ends ---

FIVE

2:40:30 Or is it destroying a link to this Amazon Aws that I have to keep up and running forever? Basically question I would have for that.

LAUREN

2:40:39 Yeah, but.

FIVE

2:40:39 Just the fact that it's there and documented is very good because I have done a lot of demos and the documentation is sorta nebulous or non existent?

--- Purchase decision ---

LAUREN

2:40:48 Yeah.

FIVE

2:40:49 Really good to see. So that's good. Okay.

LAUREN

2:40:55 Questions, can I answer about the onboarding process or attempt to answer rather?

FIVE

2:41:00 Okay. I think I had the bullet point in there and you show me a little a slide that had a little bit of that, but I'm curious if there's another like more detailed sort of typical project plan and with the detailed steps because that one or that was up there, it was a sort of very general steps, a detailed version of like what goes on in each one of those things.

--- Purchase decision ends ---

TANYA

2:41:27 And...

LAUREN

2:41:27 I'll check and see if we have something like that. We.

IPHONE

2:41:31 When we're...

LAUREN

2:41:32 Working with companies of your size, it tends to be a little bit more of a bespoke type implementation since you have specific needs where I'm guessing we're going to have some accounting something or another going on.

--- Implementation and ongoing support ---

LAUREN

2:41:47 So it tends to be a little less formulaic than some of our SMB size sales. So I'll see what we have and I can share that with you if I get permission to. But yeah, I'll see what resources we have.

FIVE

2:42:02 Okay. That's good. What about like the training and go live is the option for having somebody on site like that first week or it's just the first real week on the system and there's gonna be questions all over the place.

LAUREN

2:42:19 So, so there's obviously ongoing training there's kind of self guided training. And then what I did on, we're gonna, this is kind of a shameless segue into the pricing discussion. We added two days of onsite support to the statement of work order since that sounds like something that would be interesting for you. So, so that's certainly an option should you want to go that direction. And our most successful implementations include onsite support.

FIVE

2:42:51 We would definitely want that. Yeah. Okay. Questions. All I had for now aside for just maybe a deeper dive in a future discussion about the integrity data details.

--- Purchase decision ---

LAUREN

2:43:09 Yeah, we can do that. What I wrote down as next steps is I know Rick was taking lots of notes. So I'm not gonna go into all the questions that we have the answer, but that's the quite outstanding questions is certainly a next step. I have the to do to send more information to Jim and David about the Northboundary live webinar.

--- Purchase decision ends ---

LAUREN

2:43:37 So getting them signed up for that, there's some... I think I'm gonna have Tanya introduce you to a stage partner that's worked with ServiceTrade before because if you go through stage directly, you're gonna have a bad time just from my experience because if you get the wrong person, they don't know service trade from their elbow.

--- Purchase decision ---

LAUREN

2:44:03 I wrote that down as the next step. And then I'd love to hear from you if the timing is right for us to have a pricing discussion or if we should table that for another time when the right people are in the room.

FIVE

2:44:21 It'd be fine to do the pricing discussion. Is the pricing? Is it fairly straightforward or is it more of a custom built for everybody?

--- Type of work ---

LAUREN

2:44:30 It's it's...

IPHONE

2:44:31 Well...

LAUREN

2:44:32 You said straightforward and I said yes, but then you said custom built, but it, it's kind of both. So we take the service trade suite of products and through your evaluation, we kinda determine which ones... will be the best fit for your current needs. We, I was operating with the understanding you have like 30 technicians across your service and install departments.

--- Parts management (inventory) ---

LAUREN

2:45:01 And because of your interest in reporting enterprise is going to be where you guys need to be from a subscription level. I did put on here the Northboundary product and I also believe that part's purchase thing is something that's going to be important to you. We didn't review that today, the parts on inventory management piece of service trade. But based on what Rick was telling me, I think partsledger is something we should look into as well to show you how service trade handles po creation as well as like receiving on the back end. And there were a lot of questions about that. If you're not doing inventory, you may not need partsledger warehouses, which is where you kinda track inventory and the vans. But I remember Terry saying that would be something you might consider down the road. But this is basically sort of what I was thinking would be the minimum of what you would need to get started with service trade.

FIVE

2:46:00 Yeah, it's always good to know on pricing because we're always keeping that... you know, we're aware of it and everything and it's part of the decision and everything. But I know Terry had mentioned wanting to do inventory and all that. But it's just good to know what's included with the base and what's sort of an extra add on. And up there, I'm not seeing. So just office users, are those all included? Just?

--- Access to information ---

RICK

2:46:27 Yes.

FIVE

2:46:28 Pretty much just that each tech is part of that top licenser.

LAUREN

2:46:32 Yeah. So the way our pricing is aligned with is whoever needs access to the mobile app, generally speaking that's technicians, but there may be instances where you have like a salesperson with a mobile app or something like that. But yeah, all administrative users that don't need the mobile app or are considered overhead. So we don't charge for them.

FIVE

2:46:55 Okay. What about... like the data? Like it says, it's just stored it's stored in your cloud. I'm sure using just like Amazon or azure or something and.

LAUREN

2:47:10 Aws, yep.

--- Implementation and ongoing support ---

LAUREN

2:47:12 And I, I'm guessing your next questions around what is the implementation run? And we do have some line items for that as well. The account set up for companies, your size is about 7,500 for the core service trade application. I did add about 30 hours of project management to support the stage integration because there is some customization on inevitably that happens, I guess about 30 hours. But if you guys ultimately start with service trade and wait to implement intact or insert accounting system here, that wouldn't be included. And then of course, the setup for Northboundary and parts.

REINHARD

2:47:55 Ledger is.

LAUREN

2:47:56 Pretty pretty small, but one to include that. And then of course the onsite training.

--- Purchase decision ---

FIVE

2:48:01 Okay. Okay. Yeah, that all looks good. So, and we'll get this in the recording so we can review it later.

RICK

2:48:11 Yes. Yeah. It's all recorded.

FIVE

2:48:14 Okay. Well, yeah, that, this is all pretty in line with other large softwares like we've looked at, so.

FIVE

2:48:21 What else are you?

LAUREN

2:48:22 Guys, considering I didn't even ask Rick that question.

FIVE

2:48:25 We're we're looking at other ones. BuildOps is another one that sort of slated to be demoed?

IPHONE

2:48:34 What?

LAUREN

2:48:36 I can't match BuildOps pricing because when they know we're in a deal, they're gonna cut their pricing in half. So if I need to pack up and go now, just tell me.

--- Accounting integrations ---

FIVE

2:48:46 Is one thing, but definitely the functionality and documentation.

RICK

2:48:49 Exactly. I mean we got the proof to show the value of what we get.

FIVE

2:48:56 Right. Yeah. That's definitely what we're not trying to rush into anything. Another one we're looking at is Microsoft dynamics 365. Then they've got their whole field service module there and they also got all the... it's more like a general ERP.

--- Accounting integrations ends ---

FIVE

2:49:13 So field service seems like it's more of a specialty module of it versus, you know, like a service trade or BuildOps or other ones out there. When we looked at the past was also data work and they have like two two different levels of product like their vision is like sort of a medium size for medium sized business. And then they have their global edge for large organizations. We looked at both of those and global edge. We just didn't want to go with that one because it was just, we just, the interface was a sort of old and clunky and it was just way too much for what we need. And then vision, we have a lot of people look at it here and people were saying it was just a little bit tougher to use and sort of not everybody was saying, yes, I want this. So we're looking at other ones but we still want to look at BuildOps at least once.

--- Pricing ---

FIVE

2:50:07 We've actually looked at them in the past, but we just kinda moved on from them. But we're gonna look at one more time here and at least dynamics 365 once.

LAUREN

2:50:18 Yeah. I think you'll find that 365 is you're probably gonna run into the same frustrations that you had with Sam pro, is that?

--- Pricing ends ---

FIVE

2:50:28 It?

LAUREN

2:50:30 Does everything but doesn't do everything well. It's like would you rather be a one trick pony or would you rather be a pony that can do a bunch of tricks? Just mediocre?

FIVE

2:50:45 Look at, you know, I look at their number. One thing I look at is the documentation and what's publicly available and zero documentation publicly available. That's a red flag for me. Dynamics. They have tons of documentation available from top to bottom everything. But I've noticed that the quality of the documentation, it seems like a lot of at least a large portion of it seems like it's auto generated and it's just, it's not, it's sorta yeah, everything but it's doesn't it's not doing everything well, but I want to at least do one one demo of that.

LAUREN

2:51:17 Yeah. Yeah. Well, how do you think we did today? I know you sent over an agenda with high expectations. How did we do?

FIVE

2:51:24 Thought you guys did really good. All everybody had their questions answered and I know we went over time a little that's fine. But yeah, I don't know... with these breakout sessions, it's a lot to cram into these little windows that we have.

LAUREN

2:51:43 I knew starting with Reinhard was a gamble because he does like to talk.

FIVE

2:51:49 Yeah, that's no problem at all. But I think for next steps, we definitely wanted to at least some more of these breakout sessions like I think Terry has it's kinda like he had some more questions about the accounting and whatnot. Okay?

RICK

2:52:06 Certainly David too. I mean, it's too bad that he was sick today, but I think the Northboundary side would really open up his eyes on the sales contracts and stuff that he does.

FIVE

2:52:16 Yeah, I think a want to see something that was one question that was kind of floating around in my mind because I remember during the accounting part... there was the phrase up on the screen system of truth. And so that's kind of the question I had that Northboundary is for a proposal and a contract and all that who's the system of truth for that whole thing is it is all live in Northboundary as eventually something has to get over to service trade?

LAUREN

2:52:43 Yeah, I would say, so you've won that customer Northboundary would be the system of truth. And then like service trade take takes over once that customer.

FIVE

2:52:54 They sign off on it and say, yes, then it just lives in service trade. Is it still in Northboundary? Yeah, it's just marked as one basically and then that's right? Yeah. Okay. That's good to know. I just curious about.

LAUREN

2:53:09 Yeah. So, so I'm thinking for like more breakouts, I think to risk point, maybe getting some time with Jim and David on the Northboundary stuff would be good. I think for Terry maybe a revisit for the accounting and then maybe a conversation about inventory arts management would be warranted. And then what other breakouts do you think we would need?

--- Access to information ---

FIVE

2:53:36 Well, I think something on the technician field app is something where we can get maybe a tech or two in here that's interested and just sort of let them see the app and what not all the stuff they can do. And then something for me personally just to talk more about the database details.

LAUREN

2:53:54 Okay. Yeah. The field app is something we could easily, we could do something like this where we start... with Terry and Tanya and then kind of transition to the field because there is some overlap with the parts management and how it works from the text perspective as well, one that we pair together.

--- Tech time tracking ---

FIVE

2:54:17 I think about for Terry in particular, I think something that he would want to see is the like technician time tracking and how it gets to payroll because right now, there's like doing our payroll and everything. It's just a very time consuming process the way that we do it.

--- Tech On-site ---

FIVE

2:54:35 And we have these, our technicians clocking in and out of the job on the app, but then they're also marketing their time on an excel spreadsheet which gets emailed back to the office. And so we would just want to see just all those details of the technician clocking in and out of the job.

--- Tech time tracking ---

FIVE

2:54:53 And how does that look for payroll at the end of the week? How does that work for, or what does it look like for actually billing the customer? And then the technician getting paid? Yeah.

LAUREN

2:55:03 Yeah. You guys are non union. Is that right? Or you union? Okay?

FIVE

2:55:10 Yeah.

LAUREN

2:55:11 Okay. I'm just asking because union contractors do their time tracking a little bit differently because of union requirements. But, okay, I know what, I know what to show you.

FIVE

2:55:20 Okay. And then, yeah, for some of those jobs that they have prevailing wage on?

LAUREN

2:55:25 It's fine.

FIVE

2:55:27 Yeah, exactly. That say when that comes up, but I just be good to see if there's any sort of functionality there and what it looks like?

--- Implementation and ongoing support ---

LAUREN

2:55:36 Sure. Okay. I got that. All right. This has been super helpful. You said you weren't trying to rush thing, but did you have sort of a vision in mind of when you'd want to be live with service?

FIVE

2:55:47 We don't have a specific date or anything it's but I want to definitely demo those other two two products and that will be at least a couple of weeks here to get all those setup. But yeah, once we find something that works for everybody, we wanna be going live pretty quickly.

--- *Implementation and ongoing support ends* ---

IPHONE

2:56:06 Okay.

FIVE

2:56:07 Yeah.

TANYA

2:56:07 All right.

FIVE

2:56:10 All right. Overall, go for five star here to be live by the end of the year pretty much but obviously, if we can get live sooner than that, we'll jump on them.

LAUREN

2:56:21 Yeah. Well, we've been doing this for 10 plus years and as you can tell, we've got a... pretty thoughtful implementation process.

--- *Implementation and ongoing support* ---

LAUREN

2:56:34 I look forward to introducing you to that team so they can answer some more of your data questions, but you guys would get up and running before the end of the year assuming you pulled the trigger before June. Okay? But probably sooner.

FIVE

2:56:48 Okay. That's good to know.

--- *Purchase decision* ---

RICK

2:56:52 Excellent. Yeah, I.

FIVE

2:56:53 Don't have anything else here. So, thank you guys. That was a really good demo. Yeah, all our questions are answered. Yeah.

RICK

2:57:03 I'm gonna have that recap side. I know a couple of your folks haven't joined on that yet, but you might want to check out some of those tabs because it gets into some of the information might help you understand things a little bit better, but certainly these breakout sections, we'll just nail that for you because I know you'd like that.

--- Purchase decision ends ---

RICK

2:57:20 So, but I'll put in another recording there so you can access it and might add some more tabs on their info for your team.

FIVE

2:57:28 Okay. Yeah. If you send that to me and I'll send it out to everybody here. That should be good.

RICK

2:57:35 Excellent. Well, Andy. Thanks for setting this up for us. Really appreciate all your work on it.

FIVE

2:57:41 Thank you. Well, I'll see you guys next time and we'll be in touch?

RICK

2:57:46 Yes. Should I link back up? Probably with Jim? I'm guessing from here? What do you think just to kinda check in on what our next meeting would be? Or would that be?

FIVE

2:57:55 Yeah, I would stay with me because.

RICK

2:57:57 Okay. And...

FIVE

2:57:58 Then they pass it off to me so.

RICK

2:58:00 Okay, perfect.

FIVE

2:58:02 Yeah, I'll be the lead contact.

RICK

2:58:04 Okay. Thanks, Rick. Have a great afternoon, Andy, and we'll talk to you soon. All right, you too, Rick, bye.

The End