



ServiceTrade Demo with Elite Electrical Contracting

Susan Warren with Elite Electrical Contracting
Recorded on 9/5/23 via Zoom, 1 hour 40 min.

Participants

SERVICETRADE

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ELITE ELECTRICAL CONTRACTING

Cooper Hart

OTHER

13609473440

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Transcript

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SUSAN

0:00 God afternoon.

COOPER

0:02 How are you today?

SUSAN

0:04 I'm doing well.

COOPER

0:08 I'm here, and then I also have Travis here.

COOPER

0:11 Me too hello.

SUSAN

0:13 Nice to meet you guys. Love to put faces to names if you have a camera and a pressure if you do not.

SUSAN

0:19 Yeah.

COOPER

0:22 I don't actually know.

SUSAN

0:24 All good. Let to just start off with Cooper, what do you do over there? What's your official title?

COOPER

0:33 So, I am the sales manager. My primary role is more lead generation, bidding and everything. But I kinda wear different hats. So, a lot of the other stuff I help with is kind of the back office, you know, making sure we have good programs or operating off of and things like that. So that's kinda what brings me here.

--- *Type of work* ---

SUSAN

0:59 Very good.

SUSAN

1:00 And Travis, what about you?

COOPER

1:03 I'm a hvac operations manager. I kinda oversee the whole hvac department. Make sure, you know, things are going to be running smooth for the guys in the field. Step out if I need to help... make bids. Yeah, kinda the whole different hat wear also.

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

SUSAN

1:24 Gotcha. Well, it's a great.

SUSAN

1:26 To meet you guys. My name's Susan Warren. I'm a territory manager here at service trade, basically the game plan for today, if it sounds good to you all wanna, you know, spend the first chunk of time learning more about your business, what your goals are, what you're hoping to achieve with the tool?

--- *Purchase decision* ---

SUSAN

1:43 Like service trade, give you a couple of minutes of back story about us, and then spend the bulk of the time actually in the tool, showing you around just talking through workflows if you like what you see, if we feel like there's a good fit. We can talk next steps to the end. Does that sound good?

COOPER

2:00 Yeah, absolutely.

SUSAN

2:02 Very good. I know we blocked an hour for this. Does anyone have a hard stop right at the hour or before the hour that I need to be cognizant of?

COOPER

2:12 I think so.

SUSAN

2:14 Very good. Well, I kinda wanna start off with just confirming some kind of demographic information from, the conversations that you've had with Chris first off, you know, thinking about all the folks that you have at the company out in the field that will be looking to use the tool like this. I had in my notes, that was currently six.

--- *Type of work* ---

COOPER

2:36 That accurate... in the field. Yeah. And there there's a couple of them that they do work in the office as well. But yeah, at a maximum, we'll have six guys in the field. Gosh.

SUSAN

2:50 And if you had to think about all the work that you're doing bad job volume, what percentage would you say is commercial? And what percentage would you say is single family residential?

COOPER

3:04 It varies right now. I would say it's probably like 80 commercial, 20 single family split, but we're definitely on a trajectory right now that we're trying to do mostly commercial.

SUSAN

3:22 So, you want to continue doing mostly commercial?

COOPER

3:26 Yeah. That's our plan. We've kinda kicked around the idea of opening a residential division. So that's definitely a consideration with what software we go with.

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

SUSAN

3:40 And is there anything in particular about residential service that's kinda sparking your interest in wanting to potentially go in that direction?

COOPER

3:52 Not necessarily just kinda the fact that based on our area, it's kind of a promising division to get into. Yeah. And it's one that helps, you know, it's quicker task flow.

--- *Type of work* ---

COOPER

4:08 It's... there's not long term project planning. You can kinda just show up and do the work and get paid kind of thing. So.

SUSAN

4:17 Gotcha.

COOPER

4:18 Do a lot of government stuff too. So, you know, that's months of planning and back and forth and stuff like that. So.

SUSAN

4:27 Definitely government work is not known, for it speed of completion.

COOPER

4:34 Not much.

SUSAN

4:36 Thinking about all the work that you're currently doing right now again, thinking about percentage by job volume, what percentage right now would you say is service? And what percentage would you say is install Construction?

COOPER

4:54 I would probably say because again, it, you know, of course, it depends what project we have running, but at this moment probably like a 70 percent Construction, longer term projects like 30 percent. But of course, the cap being our H vac division is relatively new. So we plan on doing quite a bit of commercial hvac service. So, again, you know, we're trying to look for a software that can kinda grow with us with that.

SUSAN

5:28 Exactly now with either, the new H fac division or what you've currently got going on when it comes to service, on the electrical side, I saw a little bit on your website and tell me if I'm wrong here that you guys have some planned maintenance programs. Is that something that's taking up a significant amount of the service that you're doing?

COOPER

5:51 Yeah, yeah. Quickly on the side and, you know, there's definitely something that we've been looking at pursuing on the electrical side, like doing some parking lot maintenance contracts.

SUSAN

6:06 Yeah. I was wondering about that with the parking lot lighting and then also the Ed, charging stations. So I was wondering if that might be a market that you guys might want to go into for the plan maintenance side?

COOPER

6:18 I would say so. And then, we're also kind of exploring, the solar sector as well. There's there's a lot of moving pieces up here in Washington right now, and there's some companies who have been selling or leaving the area and they're changing the logs up here. So they're requiring more and more things to be done by electricians.

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

COOPER

6:40 So it's one of those, you know, we're trying to cast a wide enough net that we can try to capture some of this stuff.

SUSAN

6:47 Absolutely. Yeah. I mean, everybody I talk to that has any sort of involvement with solar. It's you're just pretty much just watching like, you know, news about local government activities, seeing if, you know, that's gonna continue to be a viable market for the next year.

SUSAN

7:03 Definitely understand that.

COOPER

7:05 Well.

SUSAN

7:07 Tell me a little bit about how you guys are currently, you know, doing things today. I saw the notes that you guys are using something called my 360 E, some of those kind a custom built. Tell me a little bit about that.

COOPER

7:21 Yeah. So, my understanding is that's a program that was created by a guy in Portland, Oregon, which is pretty local to us and he originally built it custom suited for an electrical contractor down there. And then I think he kinda decided hey, this is a marketable software that I could sell to other tractors. So starting out the program was.

COOPER

7:48 I would.

COOPER

7:48 Never say great. But, it was sufficient, it got the job done. But as we've grown and we just have a lot more moving parts and, you know, especially with, the government commercial work, it just, it doesn't have the features we need, doesn't have really any integration. So, you know, we're just looking for something that we'll be able to move

with us in the future where I think we're about done with our relationship with that software at this point.

SUSAN

8:20 Yeah. I mean, that's the thing is, you know, the tools either have to grow with you or you gotta find a new partnership.

--- Accounting integrations ---

SUSAN

8:27 When you say there's no integrations. What, what kind of specific integrations are you looking for? Like accounting or something else?

COOPER

8:34 Definitely accounting, you know, always looking for that Quickbooks integration... you know, make it as easy as possible for our back office. And then we're really hoping which this isn't you know, 100 percent make or break. We can always pivot to make it work. But some sort of part processing integration. We're currently getting set up with a company called abilon. And we're hoping there's some sort of integration there that, you know, if we do open up that residential division that we can have guys like payment on site before they leave.

SUSAN

9:13 Or...

COOPER

9:14 You know, at least have a way to get those to work. If they don't directly integrate, you know, at least we can have them work in parallel.

SUSAN

9:22 Yeah, exactly. Tell me the name, did you say Avalon was the name of, the payment process or you just purchased a relationship with?

--- Accounting integrations ends ---

COOPER

9:33 Yeah, yeah. It sure is. We, we got set up with them through a local bank up here, but my understanding is that Avalon is a national company.

SUSAN

9:42 Yeah. I had heard of that before. I just wanted to double check that.

SUSAN

9:47 Well...

SUSAN

9:49 You know, kinda zooming out a little bit, you know, let's say you guys found the perfect tool for the job.

--- Access to information ---

SUSAN

9:56 I did everything you needed to do, you know, outside of like the, you know, the specific features it would have, how would the lives of your technicians change? How, how would their days at work change? And how would they be more productive?

COOPER

10:13 Well, I would say, the big thing is currently with the, my 360 E or using the mobile version on their website. Basically, they don't have an app.

SUSAN

10:27 No.

COOPER

10:27 It's pretty clunky. There's a lot of features that are missing from the mobile version that they should be able to access. So, you know, our big thing we're looking for is something that runs a little more smoothly. They have some time for them in the field, but also some time when they, you know, need to get back in the office or they have to call us with questions because they can't figure out how to do this or that?

--- Assets ---

SUSAN

10:52 You know?

COOPER

10:52 Just looking for something that's kind of a little more easy to operate when they're on the go.

SUSAN

10:59 And, what kind of things are they calling you up with? You know, is it questions about history of pieces of equipment or is there other specific model neck sets creating in terms of, you know, the tech experience?

--- Assets ends ---

COOPER

11:14 Little bit of both, a lot of its overall functionality because tell be glitches in the software. One of the things is, it seems like, you know, there's different permission levels we can set depending on the employees access, and it seems like those will never quite get straightened out. They're always clutching out. And then, jeez, I was gonna say something else, but now it's totally spacing my mind.

--- Access to information ---

SUSAN

11:42 Come back to you.

COOPER

11:44 No worries as.

SUSAN

11:46 It does like a minute like 32. It'll just pop up.

COOPER

11:50 Yeah. So I can move on to how it happens.

SUSAN

11:55 So, so it sounds like it's not even like a mobile app. It's like a mobile website that they're trying to like use out in the field.

--- Access to information ends ---

SUSAN

12:03 And that's you know, certainly I can see that creating some hiccups in terms of ease of use because it's that's not really what, you know, you're I mean, that's great for once in a while thing. But in terms of being your daily driver, it's gotta create...

SUSAN

12:14 Some hiccups.

SUSAN

12:16 Same question. But for, you know, the office slash management, how are you looking to improve the lives and productivity of those folks?

COOPER

12:28 Again, just the overall functionality because, it is clunky. It's almost like there's too many ways you can do one thing, but every single way changes it just a little bit. So, for example, if I'm working on an estimate, there's like three different ways I can get to the finish line, but they're all gonna turn out a little bit differently. So it's one of those that, how do I train someone to do that? Because I may show them how to do it one way.

--- Paper process ---

COOPER

13:01 Travis may show them how to do it a different way. When in reality, it's like we just need that smooth process that it's like, yep, this is how it works. It's all screen lined... that's one of the big thing.

SUSAN

13:17 With these bottlenecks, do you ever feel like it's creating delays in terms of getting customer communication at like work acknowledgements, quotes, invoices, anything like that?

--- Pricing ---

COOPER

13:28 Yeah, 100 percent actually, that's one of, our big drives right now because we started crunching some numbers and we're like, you know, the current software we're using, I can almost guarantee it's the cheapest one out there just because it's like ridiculously cheap. But then we start looking with the loss of productivity, that discount in price doesn't look so great anymore. When we start thinking of how many extra labor hours we're paying out. Could you?

--- Pricing ends ---

SUSAN

14:01 Huge favor and call every single prospect that I talk to and tell them that you said that because?

COOPER

14:12 All right.

SUSAN

14:12 Like, yeah, like he gets it.

COOPER

14:15 Like...

SUSAN

14:16 Lead this horse to water. He is there at the pond.

COOPER

14:18 Trying to drink. We always.

SUSAN

14:25 Yeah, I mean, yeah, like.

SUSAN

14:27 Cause it's like, yeah, you can go and buy a cheap car.

--- *Paper process* ---

SUSAN

14:30 But if it breaks down all the time and it makes you miss work, it's not really a cheap car. So, I completely get that. Yeah, I mean, I talked to a lot of folks. The same thing, is like there's no, you know, almost call it like a snowball rolling down a hill process, you know, like, you start off with a, you know, initial call, the customer that gets easily turned into a work order, the tech adds a bunch of information while they're out there that easily gets, you know, invoiced out or, you know, if there's issues that easily turns into a quote that gets approved that gets worked, that gets paid and it just continues to build, you know, on each other as opposed to like wait, I gotta go over here and call this guy for this piece and it just gets discombobulated. Disorganized. Is that, is that something else that is kind of a struggle with this? Like the kind of lack of central information all in one hub?

COOPER

15:25 Yeah. And you know, we see that affects, the field guys and the office because, you know, whether it's during the project or even afterwards we're going back and we're like, okay, now, we're trying to match part A with part B when I feel like it should just match up already?

--- *Tech time tracking* ---

SUSAN

15:46 Yeah.

SUSAN

15:46 So, keeping up with parts... part tracking, what about time tracking for your guys? Has that been done? Was that like?

COOPER

15:58 It does have a start stop integrated into it. So once you're in the job hit the time sheet and it starts your time. And then when you stop your time, you go through and you pick, you know, it's still in Progress. Was a drive time? Was it time to the job? Sometimes like we have an option where we can make a job item under the original job, then you can go in and select that. But to actually select that sub job before, excuse me before you do, the time sheet is not an option.

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

COOPER

16:41 So there's a lot you have to remember, you know, when you're clocking out of a job. And if that was streamlined, I feel like that, would, you know, help transfer a lot more information.

SUSAN

16:59 What are some other pain point?

SUSAN

17:00 Points that you can think of that we haven't talked about?

COOPER

17:07 All it... no, it's... no, there's not really one that just digs out. I ran into an issue with a change order the other day that was kind of a pain in the rear, to figure out how to do.

COOPER

17:28 Yeah. I see it as it's just overall functionality. Again.

--- *Paper process* ---

COOPER

17:34 I mean, most of the interface I work in is the estimating change order stuff like that. And it's just kinda the same thing across the board though is trying to get from point a to point B. It's always problematic. So, you know, that I think that's one of the biggest things we're looking for just an improved workflow. I think there's a lot of extra money spent just trying to figure the software out and trying to make it work and the ways we need it to.

SUSAN

18:04 Yeah, yeah, because I mean all of that adds up like I'll talk to a lot of people and they're like it's not a bigger deal.

--- *Paper process ends* ---

SUSAN

18:11 You know, it's just like an extra five minutes for every job. And I'm like, okay, but how much is that adding up over the course of a week, a month a year? And when you're at work time is money. So, I mean, I know I'm preaching the acquire on that, but definitely get that up.

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

SUSAN

18:27 No, you maybe with the change orders, they, I want to ask you about the projects that you're doing. I saw in the notes that those, you know, have some

variability, of course, government projects, you know, they can go on until.

SUSAN

18:40 Can...

SUSAN

18:41 Would you say average is about three Ish months? Would that be close to accurate?

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

COOPER

18:49 I would say that's probably on, our longer side at this point. You know, one of the, I guess benefits or whatever you'd like to say about us being a specialty trade is, even if it's a year project, our time with boots on the ground is a fraction of that.

--- *Type of work* ---

COOPER

19:06 So, yeah, I would say three months is probably more of our longer projects. Our average project at this point, I would say it's probably a couple of weeks.

SUSAN

19:17 And are most of those projects that you do, GC run or GC? Managed?

SUSAN

19:26 I would.

COOPER

19:26 Say it's about 50 50 right now, 50 percent being GC ran, the other 50 percent being a share of us being the prime and being hired directly by the owner.

SUSAN

19:39 Gotcha.

SUSAN

19:41 And is Aia billing a gotta have?

COOPER

19:48 I wouldn't say so, because I actually, I'm not familiar with what that is for like a, it, I don't...

SUSAN

19:59 Know what it is, but yes, I must.

SUSAN

20:04 I need it. Good.

SUSAN

20:06 Well, that's great news because we don't offer it.

COOPER

20:10 That's something.

--- Accounting integrations ---

SUSAN

20:12 Always like to ask when people are talking about projects, that go on for just a little bit. So, very good. Okay. So just to kinda recap everything that we've been talking about, lack of integration would love definitely need the accounting integration improved way whether it's a direct connection or something in parallel that works to take payments in the field.

--- Access to information ---

SUSAN

20:38 The fact that it's a mobile website, not a true mobile app is creating a lot of clunkiness. We're looking for better ease of use. There's too many ways to do the same thing and they all kinda turn out slightly different. So that creates time loss and it's difficult to train people.

--- Paper process ---

SUSAN

20:53 It's kinda tricky to keep up with parts that get used. There's. A lot you have to remember when you clock in and out there's issues with issuing change orders generally just getting from point A to point B is a bit of a problem. We're looking for, the text to be a little bit more efficient in the field.

--- Customer engagement ---

SUSAN

21:11 Spend a little less time dealing with the app and more time, you know, working adding value, your call the office. In terms of the office and management, we're looking, you know, for easier training for new employees and, you know, technicians that more centralized information. And then in terms of, you know, the customer relationship, we're looking for a fewer delays and getting, you know, quotes, invoices, work acknowledgments, general communication... you know, if we were able, you know, besides addressing all of those things, what other gotta have or nice to have.

--- Customer engagement ends ---

SUSAN

21:44 Are there for you?

COOPER

21:47 Yeah, I a little surprised. I totally forgot to bring it up until just this moment. But what originally brought us to you guys was we were talking to someone at pro core and we were saying, hey, we're looking for, you know, service management and pro core obviously doesn't have that.

--- Accounting integrations ---

COOPER

22:07 So they mentioned that they integrate with you guys. So then we were kinda looking at you guys and we're like, well, you know, we may not be quite ready for pro core based on our size, maybe a download thing. So then we kinda have the thought of, well, what if we look at starting with you guys now and then looking at that integration later. So, I guess my question out of that is kind of what that integration looks like.

--- Accounting integrations ends ---

SUSAN

22:35 Great question. Yeah, I just went over that with a prospect somewhat recently. So, you know, pro core is Construction software. It is designed to go. And, you know, it almost philosophically is different from us because you go and you construct a project.

SUSAN

22:51 You act.

SUSAN

22:52 So, you go forth and pro core, you construct a project and let's say.

--- Type of work ---

SUSAN

22:58 I'm good.

SUSAN

22:58 Gonna use the example of I'll do some ev charging stations. We go out. We, we use pro core to get that installed. And then the folks are like, you know, what you did? Such a great job. We want you to come out and do preventive maintenance on this quarterly.

--- Assets ---

SUSAN

23:13 So what you would then do is you would be able to sync up all of that customer information from pro core and send it over into service.

SUSAN

23:24 Trade.

SUSAN

23:26 So, you know, that customer information, you know, all of the contacts, all the details about that specific location and the customer would then come over because it's a project and not a specific piece of equipment. You would just basically send over kind of a blank job. And then from that job, you would then be able to, you know, build out the actual service and service trade. You would put in specific information about the asset or piece of equipment that you will be servicing or assets that are part of that agreement.

--- Assets ends ---

SUSAN

23:58 And then you would just be able to execute on that from service trade. So that's where that connection would live.

COOPER

24:05 Okay. Yeah, absolutely.

SUSAN

24:08 But yeah, I think you, you've hit the nail on the head. Like, when you get to the point where it's just like, hey, we're starting to do more longer projects that are really, they've gone away from something we'd call an Installation and more towards like a Construction project. And there's a lot of that and it's becoming unwieldy that's when I would get pro core involved.

--- Purchase decision ---

COOPER

24:29 Sure. That makes sense. Okay. Yeah, that sounds.

COOPER

24:34 Yeah.

COOPER

24:35 Otherwise, as far as questions beyond that, it's probably more about, the functionality of your guys program. So, you know, like, I know one thing is coming

from everybody as they want to see, the schedule board and how that all works.

SUSAN

24:52 We got to cover there. We got a few different ways to schedule things. So depending on the situation, we'll definitely be going through all of that.

SUSAN

25:02 I...

SUSAN

25:02 Let me ask you this like let's say we walkthrough this and you're like Susan, this has checked off all the boxes. The value was the price. I love this in terms of the decision making process, what would kinda be the next step? And who else from your organization would need to be involved in those?

COOPER

25:22 Yeah. So the other person would be Bobby. He's our operations manager. He is out in the field this week, so that's why it's only Travis and I would normally give us. So, yeah, that would definitely be something that the three of us would sit down and collectively make a decision on. Yeah, we would, I know. Was it, was it Chris that I was talking to earlier? Yeah, I think so with you guys.

SUSAN

25:52 Yeah, yeah.

COOPER

25:54 Yeah. He had mentioned that this would be recorded. So then that's something that we can get a copy of. Then Bobby can watch that when he has time.

--- *Paper process* ---

SUSAN

26:03 Absolutely. Yeah. I'll be emailing you that after?

SUSAN

26:06 Errand.

SUSAN

26:08 If you had to guess, what do you think, you know, the top couple of biggest gotta have for Bobby would be, what would move the needle for?

COOPER

26:19 I would say a lot of in the estimating interface... you know, he's an electrician by trade. He, you know, he's started as an electrician, and he became a business owner.

So he started with that field mentality. So, you know, and there's a lot of stuff that he likes to see... like if you guys have a price book that we can build out or you guys can help us build out, or whatever the process is, you know, trying to kind of streamline, do some flat rate pricing and just kinda speed up the estimating process if possible when you say the... yeah.

--- ST app contracts and pricing ---

SUSAN

27:03 Sorry, just super quick. You made me think of it with flat rate pricing. Sometimes people have that mean slightly different things. When you say flat, right? Are you saying like let's say I want to go out and I want to do what I want to, for the customer to think of as, you know, a solar service, I'm gonna call it, but you don't necessarily want them to see, you know, it included this part this much labor, blah, blah, they just want to see at the end result that all of those time materials add up to 500 dollars.

--- Parts management (inventory) ---

SUSAN

27:40 Is that where you're looking for or do you need a skew in the system that automatically includes additional skews with it? Does that make sense?

COOPER

27:53 Yeah. So I would say, the second option, our current program, they call them assembly pricing. So basically, we can go, okay, this is the cost to wire in a receptacle on a commercial property and it's got, you know, all the material.

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

COOPER

28:10 It's got the labor factor in there and everything. And then you can just drop that into the estimate instead of having to work out all of that individually.

SUSAN

28:19 Got...

SUSAN

28:19 A...

SUSAN

28:21 I, we can't do exactly that, but I think I have a solution for you that I think you slash Bobby will like and remind me of that when we get to, the quoting stage.

--- Purchase decision ---

SUSAN

28:33 Okay? So, we talked about that. So, you know, quoting is big deal, getting that done quickly... and, you know, anything like kinda going on in the business that would kinda, you know, delay moving forward with the tool. You know, sometimes folks are like, we're moving into a new building in October and we couldn't possibly make a decision until after that or something like that.

COOPER

29:00 No, realistically, we're at the point that the software is what we're waiting on to make a lot of other decisions.

SUSAN

29:08 No.

COOPER

29:09 That's kinda the top of our list right now is we've got some other processes we wanna change and, you know, even with potentially starting up a residential division, we don't really want to do that until we have a new software setup and everybody's familiar with it.

SUSAN

29:24 Yeah.

SUSAN

29:26 Is there anybody that you've checked out recently or anybody that you've got plans to demo?

SUSAN

29:33 Sometimes soon besides us.

COOPER

29:38 Yeah. So we did do a demo with BuildOps last week. And then of course, our... recently, it started with pro core here. I'd say a couple of weeks ago, and then that's what led to you guys. And then in the meantime, I was hearing some pretty good things about BuildOps.

SUSAN

30:00 I... what are your thoughts on the build up?

COOPER

30:06 I've got to be honest. I was pretty impressed. A lot of their stuff is really smooth. A lot of the features that.

SUSAN

30:18 Understood. Well, very good.

SUSAN

30:22 Any other questions or things we need to make sure that we cover before I jump in.

--- *Purchase decision ends* ---

COOPER

30:29 I don't think so. No.

SUSAN

30:32 All right. Well, let...

COOPER

30:33 Me...

SUSAN

30:34 Show you some slides to give you a little bit of back story about us... then we will hop into the tool and work a sample job today.

COOPER

30:47 All right.

SUSAN

30:49 Right.

SUSAN

30:50 So, you should see a navy blue slide. So service trade, we've just celebrated our 11 year anniversary. This summer. We have just over 1,300 north American customers. We help manage 13,000,000 pieces of equipment. We've helped invoice for seven point 5,000,000,000 dollars. Our favorite fund fact is just over 10 percent of the us commercial industrial buildings are serviced in some former fashion by service trade.

--- *Type of work* ---

SUSAN

31:19 All that to say, you know, basically, you've come to the right spot, you know, we can certainly handle that. The portion of residential you're wanting to do. But for people that want to do, you know, mostly commercial service contracting, you've come to the right spot. That is precisely what service trade is design.

--- *Paper process* ---

SUSAN

31:36 Fine for.

SUSAN

31:40 Any good tool should either help you save money or make your money. And we feel strongly that service trade can help with both of those things in terms of, you know, saving you money. We talked a lot about places where you're running into bottlenecks creating, you know, those slow Downs.

--- Customer engagement ---

SUSAN

31:57 So we want to help streamline those operations. We wanna make sure that your texts are set up for success. We feel strongly that your technicians time is one of your most valuable resources. So we wanna make sure that that's being used doing valuable work and collecting valuable information and not struggling through a.

SUSAN

32:14 Porly design mobile website.

SUSAN

32:17 We've got over here for making you money. A big thing with service trade is the ability to get more quotes out with really Rich information, get them out faster, get them approved faster. Therefore, you get paid faster.

SUSAN

32:31 Yeah. And...

SUSAN

32:33 Then with that as well, we want to help, you know, through all the customer communication being done in a timely and consistent way that's going to help you grow, you know, customer loyalty. So when an issue pops up or when they have someone ask them for a recommendation, you're the very first...

--- Recurring maintenance ---

SUSAN

32:49 Name that comes to mind.

SUSAN

32:51 This all rolls up into kind of five key areas, you know, when it comes to the office coordination, you know, just easy tracking of, you know, service agreements for planned maintenance work, you know, work orders, project, parts, time tracking, all organized and, you know, nested. So it's easy to find information and execute on.

SUSAN

33:10 That...

SUSAN

33:11 You know, when it comes to tech productivity, it's everything that we talked about before also the ability to, you know, get customer sign offs out in the fields and invoices from the field if needed. All of that is, you know, all in a easy to follow mobile app that's designed for the technician experience.

--- Customer engagement ---

SUSAN

33:33 In terms of customer communication, we've helped so many folks, you know, expedite getting quotes out, getting invoices out, even little things like letting folks know as a quick reminder about their appointment, coming up the ability to pay and approve things online. All of that's right there. In terms of management visibility, we talked about the need for centralized data. So folks are not just looking all around wasting time doing that everything centralized. And we've got a lot of great reporting options. So you can export information to get info on things like your most profitable technician, outstanding quotes, outstanding invoices, service opportunities that are coming up. All of that's right there for you.

--- Deficiencies ---

SUSAN

34:18 In terms of sales success, this is going to be a big component of what we're gonna walkthrough today. But whenever an issue is found, whether that is somebody calling up describing an issue or a technician discovering an issue while they were out on a job, just the ease in which that can be reported back with really Rich information.

--- Quoting ---

SUSAN

34:39 So that deficiency as we call it, that quoting opportunity can then be turned into a quote that can easily be approved and then worked. And I, looking at all of that, if you had to pick one or two that you feel like is your biggest priority from this wheel, which ones would you say?

--- Paper process ---

COOPER

34:58 I would say definitely technician productivity. And then beyond that, I would say probably a tie between office coordination and customer communication. You know, of course, saving that time in the office. But on the other side of the coin, you

know, we're really working on building a brand. So, you know, I feel like a big part of that is our invoicing interface or what our estimates look like, our follow up and keep track of that stuff.

--- Access to information ---

SUSAN

35:34 Good.

SUSAN

35:35 Yeah. Everything you described, I would completely agree with you is, you know, we definitely want to make sure that the texts, you know, down to the minute are being as productive as they possibly can.

SUSAN

35:45 Be.

SUSAN

35:46 Well, without further ado, let's jump into the tool itself. So there's three views of service trade if you will the office view the technician view. And then of course, the communication that your customers see, this is the office view and this is a work order in service trade. A job that I have prepared for us to work today.

SUSAN

36:09 Right?

SUSAN

36:09 Right here, you can see from the very beginning how we're specifically designed to be able to accommodate that commercial service that you have.

--- Recurring maintenance ---

SUSAN

36:16 Of course, we can certainly run residential through this, but this is the job that have us working today. Today. We're going to be performing a plan maintenance visit on this generator. This generator lives at the night Dale crispy cream. And the night Dale crispy cream is a part of crispy cream, corporate headquarters. So that way all of your contact information is always right there. Any time you want to send a communication, everything's right in front of you whether it's for corporate HQ or for that specific location.

SUSAN

36:50 On...

SUSAN

36:51 These are incredibly robust. As you can see we can have multiple services on multiple assets on these. You can also have multiple appointments on a single work order. So these jobs, they can be used for repairs, planned, maintenance visits. This can actually be turned into a project with a single click of a button, and then you can track work in Progress to change orders. We'll be going through that later on. But just to give a preview and of course, track a budget with all of that. So we can see that this is a plan maintenance visit. So this is something that's going to repeat automatically every three months. We have it set up. So it's very difficult for service obligations to fall through the cracks. So this service opportunity will then reappear after this is worked in September. It will reappear again and... I guess it's December. Yeah.

SUSAN

37:51 Yeah.

SUSAN

37:53 I hate that it took me that long to decide between January and December but yes, that will reappear then it'll prompt you to create that job. It's given you a lot of flexibility. If it's something where you want Steve to go out there at three PM on the third Tuesday, you can set it up so, that will generate the appointment automatically. If you want more flexibility, you can set it up. So let's do you know, whatever time block you want?

--- *Recurring maintenance ends* ---

SUSAN

38:19 And then you can use our map based scheduler to put it at a date and a time with a tech that makes sense geographically and time wise. This block of text in terms of what is expected of them during the appointment as well as these parts in labor.

--- *Quote templates* ---

SUSAN

38:36 They can all be part of a service template. So if you're doing this similar type of work across your customer base, you can create that service template, apply it. And then you don't have to recopy and paste anything. And of course you can make small tweaks to all of that.

--- *Quote templates ends* ---

SUSAN

38:53 While while we're talking about parts and just job items in general, I did wanna touch on, you know, the price book question and generally how we keep up with that. So in service trade because, you know, we have a kind of wide array of customers that we serve.

--- *Quote templates* ---

SUSAN

39:08 And of course, that information is constantly changing. We actually give the creative control to you in that regard. So it's really easy to bulk upload price changes or new items from new vendors into the back end of service trade. Of course, if it's just a couple that are changing, you can change those items one off, but it's really easy to upload, you know, the code, the item description, you know, that service line that they're working with and then a cost.

--- Assets ---

SUSAN

39:37 So that way you're really in control of, you know, the up to date ness of your price book. So those are the items that were expected to use during this appointment. This is the particular asset that we're working on both in the field and in the office. You're always going to have the ability to see a full asset history really easily. So all the previous work orders that have this on it, all the previous quoting opportunities manuals, diagrams, comments, all this sort of demographic information about this. It's all right there both for the office and for the.

SUSAN

40:16 Chegnician...

SUSAN

40:18 Much everything else we're gonna see as we walkthrough the job and see the mobile app as well.

--- Recurring maintenance ---

SUSAN

40:24 Did wanna really quickly show you what a location page looks like considering, you know, centralized information is pretty important to you guys. Any time someone internally or externally has a question about what's going on at the night Dale crispy cream, they type in night Dale, and they would be able to go right here.

--- Assets ---

SUSAN

40:41 So we can see all of the services that are active at this particular location. Looks like this one's passed to. We didn't get to it and it's already September. So we can see all of that. We can see all of the previous jobs... that we've ever done at this particular location, all of the assets are right here. So you can update that or look up that information, previous quoting, opportunities, previous quotes, and any sort of, you know, attachment that would be helpful.

SUSAN

41:13 About this particular location?

SUSAN

41:18 I just talked for a good long time. What are your thoughts on both the work order and this location page?

--- Deficiencies ---

COOPER

41:25 That, I like a lot of it. How easy is it to upload your attachment, say like pictures even?

SUSAN

41:36 Yeah. You just go to add attachments and you choose a file from your computer or from your phone. All right there. And there's no limitations on file storage, no compression.

--- Assets ---

SUSAN

41:51 Than either.

COOPER

41:54 Okay. And then back on the assets tab... is there when you click on one of those units, does a picture pop up for each one of those units? Or... how does that, how does that work?

SUSAN

42:08 Yeah. So when we go, we'll do this one here's. Our rooftop unit. This is an asset page in the office view of service trade. So you do have the ability to attach pictures if you wanted to. Right here. I have like a manual attached here, I believe.

COOPER

42:31 Okay.

SUSAN

42:31 And then the cool thing about assets like let's say you go to some place and it's got like 20 different assets on it, but they each have a serial number. You would be able to put that serial number as, you know, part of the name of the asset. And then when folks are out there in the field, if they're trying to figure out what they're actually looking at. We have an OCR that will let them scan text in the search bar of the asset and that will pull up the correct one just to make sure that no one's making any transcription errors.

--- Access to information ---

COOPER

43:01 Cool. Okay. At a tech is what you're saying?

COOPER

43:10 I'm...

SUSAN

43:10 I'm gonna say, the PC version of we designed it with, the average technician in mind. I'll say that one. But yeah, does this feel pretty intuitive so far? Pretty easy to follow along?

COOPER

43:29 Yeah, so far so good on my end.

SUSAN

43:32 Awesome. Well, let's put our technic.

SUSAN

43:36 Hat on and see what it would look like to go out and work this job.

SUSAN

43:45 Have to stop sharing this screen. Now, we're on that screen... and I want to go to service trade.

SUSAN

43:58 So this is what it would look like for your text to log in for the day.

--- Dispatch ---

SUSAN

44:01 It would have all their appointments listed out. Of course, they can see further in the future. They can also see completed jobs. It's all accessible. So the first thing we do us is our only appointment for the day. So let's go ahead and head in that direction. Of course, they can click on the directions button to be able to easily navigate there.

--- Tech On-site ---

SUSAN

44:23 But we can just go down here. I know you'd mentioned the desire to have pretty intuitive clock events. So all you gotta do is if you want to keep up with their travel time, they can just swipe across the bottom clock in as being in route.

SUSAN

44:38 And they...

SUSAN

44:39 Can tap that and click notify customer and...

SUSAN

44:45 I'm in Eastern Time. So thinks I'm very late here.

SUSAN

44:49 We can send a quick notification even if they're not running late or early. It's just a nice way to introduce the technician to whoever is going to be there. They'll have, you know, a name and a headshot as well. Is that something you think might be useful especially in the, you know, the residential ad.

SUSAN

45:15 Do you think your residential customers might like that or I guess commercial customers too?

COOPER

45:23 Yeah, yeah, you would add some value.

SUSAN

45:27 Very good.

SUSAN

45:28 Well, we'll pretend like this is a very short commit that we're doing, and we'll go ahead and click clock out and automatically ask us. Are we on site? Yes, we are... again taking another time and GPS stamp that will come back over with the work order. So from here, we can start getting to work. This is going to have all the same information basically. But now it's in a mobile friendly format for the technician. So the first thing we wanna do is what are we expected to do with this job?

--- Assets ---

SUSAN

45:58 But before that, a lot of folks will head over to comments and see if there's anything relevant for that particular location like a gate code or anything relevant?

SUSAN

46:09 So.

SUSAN

46:09 They can review that and then they can head over to services and see what they're expected to do at this appointment. We've got that same list we saw in the office view. Then we got to figure out what are we working on.

SUSAN

46:22 On...

SUSAN

46:23 So, we can go over here, review this particular assets information as promised. You're going to have, you know, all of that basic information there. But then you can also... have your service history accessible. They can click in, see that everything about that previously completed job, they can review all the previous quoting opportunities there. Any sort of diagrams it's...

SUSAN

46:54 Man.

SUSAN

46:54 Manuals would be under attachments. And then we've got comments access.

SUSAN

46:59 To them too. And.

SUSAN

47:03 And then if we let's say someone has a question about something that wasn't on this particular ticket, they can head over to all and see that same information about any other asset. You feel like this would kinda solve the asset history back and forth calls for your text.

--- *Deficiencies* ---

COOPER

47:26 Yeah, that would definitely help. I noticed that you had, a box on there that said 46 deficiencies. Does that just continually keep track of, the problems with, the equipment?

SUSAN

47:41 Absolutely. So.

SUSAN

47:45 So, we go into deficiencies?

SUSAN

47:49 This is everything that's been found at this particular location.

SUSAN

47:53 So...

SUSAN

47:53 If they get verified, you can see how that has changed status. So that's something that has been reviewed.

--- Quoting ---

SUSAN

48:01 And turn.

SUSAN

48:02 100 into a quote, but these new ones have not. So that's those, you know, there's never really fully go away until they get resolved and go into, that category.

SUSAN

48:15 All right.

SUSAN

48:17 So, that way that information can always be there. It's nice when, you know, let's say you've pointed out to a customer two times about an issue. Like maybe you can even send a quote about it and they haven't responded to it. You've got that track record to say, hey, this is really broken now and here's proof that we tried to tell you about it for a couple of times.

SUSAN

48:38 Okay. That's it.

SUSAN

48:42 So, next step is our job items.

--- Quote templates ---

SUSAN

48:45 There are the same job items that we saw back in the office. But if we need to add something as the technician, we can head over here. This is gonna be that list that I was talking about before. That way they can save a little bit of time if it's something that is in that list or if it's something brand new that they haven't used before, that isn't on there, they can key in this information.

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

SUSAN

49:09 This is really nice to keep up with parts because this is going to come back over with the work order, but also, it's going to be reportable and aggregate. So let's say this is something that they got from their truck. They would indicate they got it from technician.

--- Parts management (inventory) ---

SUSAN

49:25 Then you can run up for example, a weekly report on truck stock and replenish that. So folks aren't driving all over town for a.

SUSAN

49:30 Six...

SUSAN

49:32 Same thing with the parts vendor. They can indicate where they got it from. And then the status of that, and then run reports and all of that again in aggregate.

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

SUSAN

49:40 So, you know, you can say, hey, what are we waiting on? That's already been ordered? And what do we still need to order that way? No, that's gonna fall through the cracks.

SUSAN

49:51 Do...

SUSAN

49:51 You think that'll be helpful? I know you'd mentioned, you know, keeping up with parts was something we wanted to address.

--- Deficiencies ---

COOPER

49:57 Yeah, yeah. I think that would be helpful. Also. Where was this inside, the job itself?

SUSAN

50:06 Yeah. So back here, so we went to job items and we added a new one. Okay? And, and we just clicked, this is the new one. Yeah.

SUSAN

50:22 So we've got all of that in the, but let's say we open this up and we realized there's a broken compressor always do broken compressors inside of this gas. So we need to report that back to the office. So they can then quote that out from here. We can go over to deficiencies and then add a deficiency. And all the technician has to do to get this back to the office is fill in the information on this screen. So we'll just say that this is a broken compressor. We find the sweet spot for getting quotes approved is four to five media items. But I won't bore you with that. I will just take a single

picture of my microphone... thing like that's my broken compressor you saw in there. You can also do video audio memo, documents, add descriptions, etcetera. Let's say that this is completely inoperable. Now, we wanna keep this nice and organized. So let's say that this is an issue with this generator. It's a new deficiency. And if they want to, they can add a proposed solution. So we're saying we need to fully replace this compressor. We'll hit save on that. And just in that short amount of time, we've done everything we need to do, as the technician to report that deficiency back. So let's see what that would look like... from the office's perspective. So that is going to trigger an e-mail... and that e-mail is going to take you...

--- *Deficiencies ends* ---

SUSAN

52:07 To this page.

--- *Deficiencies* ---

SUSAN

52:23 So we've got all the information that the tech just keyed in. And then we can see that attachments gone through. We're just gonna review that in the office and, or say, yes, this definitely does need to be turned into a quote. So we'll go ahead here and click add to quote... put an expiration date on that.

--- *Quote templates* ---

SUSAN

52:45 Let's say we need to get this quote approved by the end of the month, please. And we'll go ahead and click create quote.

SUSAN

52:58 Now, this is something that I think would be helpful because I know, you know, talking about some of the things that Bobby will be interested in as, you know, kind of grouping things altogether. So this is where I would strongly recommend the use of.

SUSAN

53:13 Quote Temple.

SUSAN

53:13 It's so let's say, you know, replacing this compressor is something that we do pretty often and it comes with a standard description and a standard set of parts and labor and job.

SUSAN

53:23 Items.

SUSAN

53:25 In order to go grab that, of course, you would have made that in the back end. We can just go here and grab this quote template. I'm gonna go grab my compressor replacement. It'll have your...

SUSAN

53:37 Terms.

SUSAN

53:38 And then the commonly used parts in labor. Of course, you can tweak this as needed... and you can change the way that this gets displayed to the end.

SUSAN

53:49 A customer.

SUSAN

53:51 So, you know, let's say we do wanna just think of this as, you know, for the customer's sake, for them to see it just as a compressor replacement. In that case, you'd probably want to utilize grand total only. However, with all of the quotes, all of the invoices, you always have the option to display this. I believe it is 12 different ways. So if we wanted to get more specific and show them everything, we could change it to line items with prices, but you can set this as a default... but we'll leave that as grand total. Only. You'll always see the gross margin internally only with all quotes and invoices. So I'll go ahead and click save on that... and we can now get this on over to the customer.

SUSAN

54:41 So we can review all of this, okay?

COOPER

54:44 Yeah. Can we change the margins or the markups on the fly depending on, the different parts?

SUSAN

54:52 Yeah, absolutely. Yeah, you can change it one off like just for this one time, I want this to be this no problem. But we do offer the plan that I'll be recommending to you anyway is going to come with multiple pricing rules, the ability to create those. So, you know, if one, if you always want, you know, one type of customer to get this set of margins and this other type of customer and get this different set of margins, you would use those pricing rules to do that automatically for you.

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

SUSAN

55:22 And then of course you can tweak them one off either way. So go ahead and get this quote sent out. Another nice thing is you have the ability if folks need a little extra layer of accountability here, you can require a po for approval. I'll go ahead and send that out... and let's see what that looks like.

--- Quote templates ---

SUSAN

55:50 So this is a quote in service trade. I know you mentioned, you know, brand recognition being a priority. So it's got your brand front and center... the description that you put in and then it's laid out the way that you want. So of course, you'd have you would have changed that instead of replace. It would just say, you know, compressor replacement however you want down there. And then you would have just the grand total. Of course, you know, you had those additional options there. Perhaps most importantly, you've got all the files and photos that you need to sort of make your case on why this quote should be approved.

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

SUSAN

56:24 And from there, they can just go up there and click the big green approved now button and that will notify whoever you have set up in the office to receive those emails once that's clicked. But thoughts on this quote?

COOPER

56:38 Yeah. One of the big things that I really like seeing was, the different options for how you want to display everything that's the big thing we definitely look for. And yeah, overall, it's all easy to read and understand.

--- Quote templates ---

SUSAN

56:55 Do you feel like that, you know, with the templates and then the different ways that items can be displayed? Do you feel like that would meet Bobby's needs for, you know, some of the quoting needs that he has?

COOPER

57:09 Yeah, I would say so because, it definitely depends, you know, if we're quoting something to property owner versus quoting it to a general contractor, you know, a little bit differently. So having that flexibility is definitely helpful.

--- Quoting ---

SUSAN

57:24 Precisely. Yep. So we're looking good. The customers like my gosh, this is so bad. It has turned into a microphone. I must approve this right away. If they do that, this would change from submitted to approved. And I'll just do that. Manually.

Another cool thing is you can go up here to history of any particular quote. So, if somebody is like, you call somebody up and they're like, hey, what's going on with the quote I sent you? They're like I haven't seen it yet. You can see if they're lying because they'll show you if they open or.

SUSAN

57:56 Clicked on it.

SUSAN

57:59 You do with that information, we leave to you.

SUSAN

58:03 I...

SUSAN

58:03 All that history there. And then in terms of reporting on, you know, both quotes and invoices, you have the option to go in here. And we have all these different reporting choices that you can run reports based on. So, you know, for example, a lot of our customers do a weekly report on all past, do quotes. They can figure out exactly which ones those are. And then from there, select the relevant ones and send a friendly reminder to the customer to view and approve same deal with invoices. And while we're talking about additional reporting options definitely do like to show the tech scorecard. This is really nice just as a quick snapshot for any block of time that you like to show just how well your techs are doing.

--- Tech time tracking ---

SUSAN

58:55 We'll put this on last month so I can see a little bit more data so you can see all the time that all of your techs are spending in these various time blocks?

SUSAN

59:05 For...

SUSAN

59:05 That period of time and then how many onsite late and missed appointments, and then perhaps most importantly, how much revenue have they brought in?

--- Tech On-site ---

SUSAN

59:17 Is this something that you think might be?

SUSAN

59:18 Helpful...

COOPER

59:21 Yeah, absolutely.

SUSAN

59:26 So we...

SUSAN

59:27 Talked all about that, but we've left our technician back out there and they need to finish the job. So let's head back and finish that up.

SUSAN

59:40 Go here and then... share screen.

--- *Deficiencies* ---

SUSAN

59:57 So...

SUSAN

59:57 Reported that deficiency... from here, you know, if they wanted to.

SUSAN

1:00:04 Is adding pictures, something that would be a nice to have for you?

COOPER

1:00:09 Yeah, absolutely.

SUSAN

1:00:12 So, we would just go over here to attachments. We've got those same options. We can do video photo, audio memo documents.

SUSAN

1:00:21 Well...

SUSAN

1:00:22 Pretend like my pin is a photo we want to add on. Of course, we can add a description there as well... that's in there. And if the technician wants to add a comment, they certainly can for this particular job. Hello. And then the office gets to decide if that gets sent over to the customer.

--- *Deficiencies ends* ---

SUSAN

1:00:52 I did see something in the notes and then we talked about it. You know, as well, of course, in terms of invoicing from the field right now about what percentage of the time is that the preferred workflow as opposed to sending the invoice after office review?

COOPER

1:01:10 I would say this point, it's zero percent.

--- Quoting ---

COOPER

1:01:13 Everything gets mailed out or emailed out after the work's done. Not that that's not something we don't wanna do or it's just, you know, program can really do it.

SUSAN

1:01:26 OSHA. So if you...

SUSAN

1:01:31 So basically it's the same workflow, if you needed to turn that deficiency into a quote from the field, just kinda fyi.

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

SUSAN

1:01:37 But if you did need to generate an invoice from the field, you can certainly do that, you would just go down there or generate the invoice.

SUSAN

1:01:45 Not gonna do that right the second.

SUSAN

1:01:47 Cause I want to show you how it gets done in the office, but just know that that's a capability.

--- Invoicing ---

SUSAN

1:01:50 You, so.

SUSAN

1:01:53 The way that we collect payment is, you know, if you want to do that through us as the invoices have a big green pay now button, we're gonna see that when we work that. If you did need to use a card swiper out in the field as opposed to emailing

the customer link and then have them pay it on their device through that link. If you did need to use a card swiper, we do have customers that do that from time to time. Totally fine. Basically, what you would do is, you, would, you know, create the invoice, send it over. So they have that on record. And then, you know, card swipe, and then you could just simply grab like a screenshot of that confirmation screen on whatever, you know, on the Avalon confirmation screen.

--- Tech On-site ---

SUSAN

1:02:35 What have you, and then just attach that as an attachment. So the folks in the office can see that that's something where payment was collected in the field, but I just want to briefly to.

SUSAN

1:02:44 Much on that. So we...

SUSAN

1:02:49 We did all that. Do you guys ever need to get onsite signatures?

COOPER

1:02:55 Yes.

SUSAN

1:02:56 So, that would be super easy to do. You unsurprisingly click create work acknowledgement. We can go down here, select who is going to be signing off on the work. Say that's me, you can review all of these items with them. You can even generate an invoice from here. We'll go ahead and just click review.

--- Tech On-site ends ---

COOPER

1:03:19 So, if say, the wife calls in and schedule the appointment and we only have her name on file, but the husband's off that day. Is there a way that we can add a contact from this page or do we need to go all the way back into, the job?

--- Deficiencies ---

SUSAN

1:03:41 We would just do this, select the contact and click that plus button to add a new one.

COOPER

1:03:47 That's sweet.

SUSAN

1:03:51 So...

SUSAN

1:03:52 Save save a bit of time if it's already in there, but it super easy to add some.

SUSAN

1:03:55 Else. So.

SUSAN

1:03:58 We can go.

SUSAN

1:03:59 Here and click review it's...

SUSAN

1:04:02 All looking good to us.

--- Tech On-site ---

SUSAN

1:04:04 We would just toggle, and we, from here, we can confirm and sign it's gonna pre fill and then all they have to do is a finger signature. They'll get emailed a copy and the copy of the work authorization will be attached to the work order.

SUSAN

1:04:20 As well.

SUSAN

1:04:25 Any sort of need, you know, especially, you know, with the commercial side, is there ever a time whether it's specific like PDF that your customers require or you require to be filled in by your text on site?

--- Tech On-site ends ---

COOPER

1:04:42 Yeah, it's not something we've seen a lot of yet, but I imagine we're gonna see it more and more as time on.

SUSAN

1:04:51 Yeah, that's super easy. We have our blank paper work tool so that's going to really elevate the experience of, you know, having to carry around physical PDF print acts.

--- Forms ---

SUSAN

1:05:02 There's smart rules that automatically fill in things like customer information, asset information, and we'll predetermined which forms that the technician gets access to based on all of that as well. From there, you know, like I said, those fields are going to pre populate. So all they have to do is fill in the relevant values. You know, this value is 28 check. Yes, I did this so on and so forth that's going to pre populate, they can use that, you know, Adobe editor to fill all that in. It will then get saved back to the work order and service trade and that can then be sent on to the customer either with the invoice or just with the...

--- Forms ends ---

SUSAN

1:05:40 Service link... as.

SUSAN

1:05:43 F, Y, I about that. Any other questions about the mobile app before we clock out?

--- Tech On-site ---

SUSAN

1:06:00 Fine.

COOPER

1:06:02 Cover for the mobile portion?

SUSAN

1:06:05 Good.

SUSAN

1:06:07 All right. So we'll go ahead and clock out. If there are multiple services, they would have to check that they did all of them. So we can go ahead and continue clocking out. From here. This is something you can have set in the back end. You can require all. None, some of these things be done before they can clock out. In this case, we've already done all of these things, attaching a photo, leaving a comment, find a deficiency... that's just kind of an extra check.

SUSAN

1:06:32 To...

SUSAN

1:06:33 Make sure that your techs are doing everything you want them to do. So from here, we can go ahead and finish clocking out and we...

SUSAN

1:06:40 Good to go onward to the next appointment.

SUSAN

1:06:45 Now, we can head back to the office and get paid for this job.

SUSAN

1:06:53 So we'll go over here.

SUSAN

1:06:57 And we'll see how this has changed status from schedule to completed. So us in the office, we're going to be reviewing all of this, making sure that everything's looking good.

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

SUSAN

1:07:12 Any additional comments or pictures of been added. If they added on a part, we could see that there there would be a little icon indicating if it was something that was ordered, something that needs to be ordered. And of course that's reportable in bulk as well. We can see all of our clock events.

--- *Tech time tracking* ---

SUSAN

1:07:27 So we can review and be like, okay, you know, they only spent 20 minutes. I mean, she only spent 20 minutes on site. Should we really be charging an hour and a half for labor, your call, whether or not you want to adjust that? It's also giving us a warning because it says they clocked in as being on site.

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

SUSAN

1:07:44 They were actually 35 Miles away spoiler. I did not actually physically go to the crispy green for that. We can also go here and review these comments and let's say this. This is very important comment that we want our... we want our customer to see. So we can change that to everyone but see how I had to manually do that. So accidents won't happen there. And then with these attachments, we can review all of that, figure out, you know, in the next step, which ones we want the end customer to see. But we've got those photos and then we've got that work acknowledgement as well. And if there was any blank PDF that we had filled in, they would be accessible from there too. This is all looking good to us. We had everything we needed. So we're ready to go ahead and mark this complete from the offices standpoint. So we'll go ahead and complete the job and create an invoice.

SUSAN

1:08:51 So this is as you can see very similar to, that quote screen.

--- Access to information ---

SUSAN

1:08:55 The other thing I did just slightly off topic. I did wanna mention with quotes, that whole deficiency process that you saw on the mobile app that can also be done in the office. So if you ever need to quote based on, you know, a phone call as opposed to someone physically going out in the field, you can certainly do that.

--- Quote templates ---

SUSAN

1:09:14 So we can go in here again. We've got the options of how do we want this displayed just for funds? Let's make this be line items with prices. So you can see what that looks like. Again, we can see that gross margin on there. Make sure that's nice and profitable before we send that out. And then we can see that.

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

SUSAN

1:09:30 Comment is coming through.

SUSAN

1:09:33 So, we're feeling good about this. So let's go ahead and send this invoice to the customer. So I'm gonna click here on send invoice link. We'll do a full screen preview on that. So, pretty standard invoice, right? You know, it's got.

SUSAN

1:09:52 The...

SUSAN

1:09:53 Items on here are displayed the way that you want. I have it set up. So, you know, in the back end, for example, that's something else you can do with pricing rules, you know, make certain items taxable versus non taxable... got our comment, the TS and CS, but the real value of our invoices is the service link. Now, keep in mind, the service link can be sent before during or after the appointment is separate from the invoice. But let's go ahead and take a look at that. So, when we click on this, we can see, you know, not just, you know, who went out and did the appointment. We can see, the detail the services they did, of course, you know, parts and labor that comment, we can see the pictures that they attached. And then we can see that we went the extra mile and found that deficiency. So, if somebody is getting the invoices separate from the person getting the quote, there's no surprises there.

--- Invoicing ---

SUSAN

1:10:47 So all that would be right there for them. So they can review all that. And then if they're ready, they can go ahead and click the pay now, but...

SUSAN

1:10:54 On...

SUSAN

1:10:55 That pay now button is going to prompt them to key in either AC H or credit card information if you want them doing that. And, you know, our payment processor that runs through that button, it's called stack and they have pretty standard rates for all that. American express is the highest at like three point two five. Then all the other credit cards are like two point seven five. And of course, ach is the cheapest, like.

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

SUSAN

1:11:20 Point seven.

SUSAN

1:11:21 Five percent. Yeah. Thoughts on this invoice and the service link.

COOPER

1:11:28 The, the service link especially stood out to us. That's really cool.

COOPER

1:11:32 Yeah, that's like.

SUSAN

1:11:38 Big fan of that. Because then, you know, you can't be like what do you actually do here? What am I paying for? We'll look at these pictures, Steve. This is what you're paying for.

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

COOPER

1:11:46 Yeah, it saves that phone call of, hey, I just wanted to touch base on what exactly did.

SUSAN

1:11:53 Yeah, yeah, exactly. Exactly. I don't know why the disgruntled customers always name Steve in my hypothetical situation, but yeah, it's all right there and it's and just know that, you know, this is all optional. So you can go into that screen and

choose what to share with customers. If some customers don't want to see the deficiency that you found on this, no problem. You can just toggle it right off.

SUSAN

1:12:20 So.

SUSAN

1:12:20 So that, that's how you get paid. Now, we need to figure out how do we actually schedule these jobs that we work?

--- Recurring maintenance ---

SUSAN

1:12:29 The first thing I wanna show you is our service opportunity. So I alluded to that when we're talking about how to keep up with plan maintenance, but this is really how to keep up with anything that has a due date on it that, you know, recurs automatically.

SUSAN

1:12:48 So.

SUSAN

1:12:48 So, you know, for here, for example, you know, as we're thinking about, you know, especially on the H back, but, you know, even on, the electrical side growing that plan maintenance, basically, all you would do is, you know, we run a report on all these service opportunities that are coming up next month. And this is going to help us schedule this in a smart way. So when we click on all of these, is there, everything that's coming up due in October? You can see here, you know, some of these have multiple jobs. For example, there's a lot to get done in October.

--- Recurring maintenance ends ---

SUSAN

1:13:20 At the target and.

SUSAN

1:13:22 Burg. So that can, this is all automatically going to be added to a single job. And that way you can schedule them, you know, for example, if you can get a couple of folks out there and knock that all out in one day, you're gonna save, a good chunk of money and gas.

--- Recurring maintenance ---

SUSAN

1:13:37 So we're able to actually create these jobs. Of course, we would just change, you know, whatever job type it is. Let's say these are all planned maintenance. And then from there, we can actually create all of those 11 jobs if you put in the parameters when you set them up saying, hey, I want, you know, Jimmy to go out there third Tuesday, three PM.

--- Dispatch ---

SUSAN

1:13:56 It's gonna automatically generate the appointment. No additional steps needed. However if you wanted that flexibility and you wanna use our map based scheduler to get that going. We would just head over to our map based scheduler... and ignore the vast array of overwhelming information that I'm scrolling through right now because this is a demo account and you would have like 10 of these and not a 1,000... and this is going to show you. So we can go in here and we can actually change it to let's say jobs that are due by let's say next month?

SUSAN

1:14:35 And basically what you do is you would work through all the unassigned and unscheduled appointments until they were assigned and scheduled. So here, for example, this light blue one that is on Adam strong, it has been scheduled for October nineteenth at eight a M. But this gray appointment, we do not have a technician assigned to it yet and it's not on the schedule. So let's say we want Nicolett to work this job... and it is due at some point before the 30 first. So we can just drag that onto the schedule. Looks like.

SUSAN

1:15:19 Go over here and make that, be her. There we go.

SUSAN

1:15:23 And we can drag that on there actually accidentally add an additional technician. So rein heart and Nicolete... are now both on the schedule. So you just keep working through and basically just make sure that what you're doing makes sense geographically... that's how you would schedule.

SUSAN

1:15:42 Things.

SUSAN

1:15:42 That are planned for the future. Do you think this will be helpful?

COOPER

1:15:49 Yeah, yeah. I would definitely say, so, I really like that you can kind of forecast for your preventative maintenance.

SUSAN

1:15:57 Exactly. And, and that's the nice thing because, you know, let's say hypothetically it's Wednesday afternoon and someone calls up and it's like my, gosh, I'm your favorite customer and I need you out there tomorrow morning and I only want Nicolete. Well, no problem. Because you can just push this appointment, you know, a few days out, but it never falls off the schedule. So that's how we do our proactive scheduling, of course, reactive scheduling. It's never not going to be a...

SUSAN

1:16:28 Dead...

SUSAN

1:16:32 So, for that day by day, emergency scheduling, we would head over to our dispatch board and it's your standard issue dispatch board. You can see day by day who's doing what, where they are. You can drag stuff around. Looks like he's already completed that. I'm gonna go back a few days so I can show you some actual appointments on here. Yeah. So this has been completed. So we couldn't no one has any scheduled jobs left on here, but you would be able to drag it around, adjust the amount of time on there, the color coding in the type of job.

SUSAN

1:17:11 And...

SUSAN

1:17:11 These little blue line show clock events. So you can just quickly see where everybody's at. If you need to add a job, you would just look across, see who's available when it's gonna do a smart search for you. And so it's gonna fill all this information in if I can type correctly.

SUSAN

1:17:27 And then...

SUSAN

1:17:27 You just look across, schedule it and then you can click on individual jobs to pop them out and get them back into that kind of main work quarter screen that we started with. If you want to add more detailed information, yeah, that's more for reactive. Of course... yeah, that is scheduling. And then I want to show you what it looks like when we log in for the day the service trade, this is our service dashboard. So we've got our daily schedule on here. Keeping it pretty light coming back from the holiday weekend. We can see where all of our techs are based on their most recent clock events here's. Another spot that's really helpful for whatever reason. Just another area. We can make sure we're catching this stuff. So there's any overdue jobs, with no appointment created that would live there jobs without appointments. They're doing the next two weeks. We want to act on that pretty quickly as well. This little area is really where the office folks spend a good chunk of their time as these pass do jobs. We marked complete. A, so the tech has done all none, some of the work we need to review it and, you know, market complete and send an invoice or perhaps, you know, order a part and reschedule it... and we go over here and of

course, we've got where the tech is marked to complete. The office is marked complete, but we've got money on the table because we haven't invoiced it out yet.

SUSAN

1:18:51 It...

SUSAN

1:18:52 And then just to very quickly show, you know, in terms of potentially needing to keep up with... jobs that are waiting on parts, things like that?

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

SUSAN

1:19:04 But...

SUSAN

1:19:06 That's super easy to do. So you can head over here and search for jobs for example, with, you know, they're overdue for delivery. They're partially received parts need to be ordered, all these different parameters so you can report on that in mass.

SUSAN

1:19:22 Hello?

SUSAN

1:19:27 Did wanna briefly touch on what it looks like to do a project as well.

--- ST app contracts and pricing ---

SUSAN

1:19:33 So basically, what does it look like to take that standard job that we did and then convert it into a project?

SUSAN

1:19:40 So, let's...

SUSAN

1:19:41 See, hopefully I schedule this far enough in the future that still no, I'm overdue now, I made this too long ago. But so this is what it looks like when you convert a job into a project. So basically, this is going to allow you to have internal and external change orders. It's gonna allow you to operate a budget and then you can manually just adjust the completion as well. So we go over here. We can go over here to performance. We haven't really charged much of that yet. But as we have built things out, total invoice would increase. And then your total incurred cost as you actually work these jobs would increase as well. We can head over here to the budget.

SUSAN

1:20:36 And it's gonna show us that executive summary. So you can kinda see big picture where's the spin going, you can create change orders whether that's internal only or external where it needs to be approved.

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

SUSAN

1:20:51 So we can see that history of that change order... for that. Got approved. If we need to create a change order, we can just go in, make any of those swap out and see what those look like. And basically the...

COOPER

1:21:11 These jobs and projects say we go to a home depot or, you know, buy something from our warehouse. How would we attach those purchases to the job? Manually, manually enter those... like, can we do that from in the field?

SUSAN

1:21:32 Yeah. So you would just basically add that as a job item, you know, key in the relevant information like we saw back on, the mobile app screen.

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

SUSAN

1:21:40 And if you needed to attach a receipt for that, you could certainly do that under the job attachments. And if that's something that you don't want the customer to see, you would just, you know, toggle that off before sending anything to the customer.

COOPER

1:21:58 Got you. Okay.

SUSAN

1:22:02 Yeah.

SUSAN

1:22:05 In terms of, you know, project management and this budget management component there's an additional link that kinda walks you through all of, the functionality with that.

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

SUSAN

1:22:15 So I'll be sending that along as well. But that is a kind of the grand tour of service trade thinking back on all you're nice to have and gotta have. And, you know, both from your perspective as well as Bobby's is there anything that I didn't address?

COOPER

1:22:35 You guys have a way to manage permits at all?

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

COOPER

1:22:40 Manage. Yeah. So our current software, it has a feature or basically, it's like a, what would you call it like a widget or whatever specifically for permits? You can attach your permit to that, and then you can update the status of the permit, you know, if the permits been purchased and we have received it. If there's inspection schedule, that kind of thing.

SUSAN

1:23:09 Gotcha. I think the way most of our customers do that is they kind of make that be a phase of the job like the acquisition of the permit. And so that way you can track whether or not that's been successful, have a due date on requiring that. And then you can create any sort of attachments with additional details around that... but there's not like a specific like permit functionality, but that's the way most of our customers do it.

COOPER

1:23:39 Okay.

SUSAN

1:23:41 But yeah, that would be part of like the project and like phase one, get the permit. What, what we gotta do, we gotta do blah, blah, blah. Yeah... if only were that simple, just wave your hand and suddenly the permit is here.

COOPER

1:23:55 Yeah, no caring.

SUSAN

1:24:02 But, yeah.

--- *Purchase decision* ---

COOPER

1:24:02 But otherwise, do you have any other questions? I think that about covers it for us for now?

SUSAN

1:24:10 Good. So.

SUSAN

1:24:13 It sounds like this is kind of, I mean, may I ask how we're comparing functionality wise to build ups?

COOPER

1:24:21 Very well. It's definitely gonna be a discussion, maybe a couple of discussions to see... what direction you wanna go?

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

SUSAN

1:24:34 Just.

SUSAN

1:24:34 Just wanna make sure there wasn't anything that's like wow, that was so great with them that we don't have, that didn't address?

COOPER

1:24:42 The only one I can think of is as far as making purchases in the field and... attaching the receipts if I remember, right? BuildOps has a way that it's like its own thing and that attachment is tied in with that purchase instead of just going into like the general attachments?

--- *Recurring maintenance* ---

SUSAN

1:25:05 Yeah, because with us, it would be nested with the job, but it wouldn't be like it wouldn't be like a link for example, beside that part, but it would be attached to that specific job.

COOPER

1:25:21 Sure. And then try.

COOPER

1:25:24 Member, did you guys have a way that? Okay? So we've got, you know, customer like crispy cream and we manage six of their facilities or something around. Is there a way that I can basically easily pull those up? So, you know?

SUSAN

1:25:45 Absolutely, yes, that's head back... one day. I'm going to finish a demo without 7,000 tabs open? But today is not that.

SUSAN

1:25:58 That day, so...

SUSAN

1:26:00 This, from this location page, you can just head over here to company... and then you can see all of the crispy cream locations and then be able to go to any one of their location pages.

COOPER

1:26:17 Okay. Very cool. That's exactly what I was on.

COOPER

1:26:19 So, those attachments underneath the corporate headquarters, are those attachments in the jobs also? Or is that a separate there just for?

SUSAN

1:26:31 This is just for the HQ. So this is really that would be more for the office?

SUSAN

1:26:36 You know?

SUSAN

1:26:37 In terms of like if there are some sort of special documentation for their corporate offices, you would wanna put that.

COOPER

1:26:44 Or if we have like a master service agreement for all those?

COOPER

1:26:48 Locations or something I got you.

SUSAN

1:26:51 Yeah, that would be cool. The, the other little thing that I forgot to show you all is what those like how we can kinda use the pricing contracts to track the success of different plan maintenance agreements.

SUSAN

1:27:04 So, let me go here.

SUSAN

1:27:13 And contracts and this.

SUSAN

1:27:18 So, this is the default pricing contract for crispy cream corporate, I mean, for crispy cream nightdale. So one is going to let you have all these cool, different rules

about how much things cost when this particular contract is applied... a lot of different options here. You know, different teas and sees you can. And then you can see all of the invoices that are tied to this specific one. But the nice thing here is that you can track this if you use this, like let's say you're gonna use that for Kristy cream... night, Dale, all their planned maintenance agreements, you can track.

--- ST app contracts and pricing ---

SUSAN

1:28:00 How...

SUSAN

1:28:00 Much has been invoiced to this? And then what the actual margin is as well. So you can see how successful your various PM agreements are.

COOPER

1:28:10 So, if you would scroll down?

COOPER

1:28:17 A little lower we're with.

COOPER

1:28:20 You, the trial contract?

COOPER

1:28:22 Yes. So, would this one be considered a child contract or can you have child contract under this?

--- Recurring maintenance ---

SUSAN

1:28:29 Or you could, if you wanted to have a parent contract for all of your crispy creams and then there are slight variations or you just want to track the success of the locations specifically, then you would use the child contract functionality. Okay?

SUSAN

1:28:55 Yeah. So that's just a helpful tool and, you know.

--- Recurring maintenance ends ---

SUSAN

1:28:59 Both.

SUSAN

1:28:59 The, the different pricing rules, but also... tracking the success of those any?

SUSAN

1:29:07 Other questions?

SUSAN

1:29:10 Things to address before we talk pricing.

COOPER

1:29:14 I don't believe so.

SUSAN

1:29:18 All right.

SUSAN

1:29:19 So first, let's talk about which plan is right for you. So we do everything that's why I was asking about text out in the field as opposed to general employees.

--- Pricing ---

SUSAN

1:29:31 So everyone, we only do charge by the number of licenses you need for the mobile app, and you can have three users in the office or 12 same price. So everything that you're describing, I would strongly recommend getting started with our premium option, a few different that's another thing.

--- Assets ---

SUSAN

1:29:54 The, this comes with a service portal. This is really cool because you can just attach this link to your website and it lets your customers log in and they can see... all of their history, all of their invoices, any sort of outstanding quotes, all right here. And then they can even drill down to the asset level at a particular location... and request service on that particular asset that will trigger an e-mail and then create a blank job for you to then work with a customer to schedule out.

--- Customer engagement ---

SUSAN

1:30:32 But in terms of, you know, elevating the customer experience, having that Amazon like experience... that's a really great way to kind of build on that. Is, is that something you think you might wanna utilize down the road?

--- Customer engagement ends ---

COOPER

1:30:45 Yeah, 100 percent... that's definitely something that we haven't seen with anyone else before. So that's pretty exciting.

SUSAN

1:30:54 Yeah. I love the portal because it feels like it just like everyone's doing this like high quality high technical, you know, technically challenging work. And this is kind of just bringing helping to bring that experience up a level for the customer.

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

SUSAN

1:31:09 So...

SUSAN

1:31:11 I am obviously a big fan of that, so they can access all of that here. Of course, if you click on these jobs or these invoices that's gonna take you to the service link?

SUSAN

1:31:20 Think for those particular ones. So, yeah.

COOPER

1:31:26 I sent out a quote. We can see if they open it. Is that the same for an invoice? Also?

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

SUSAN

1:31:34 Question thing.

SUSAN

1:31:36 Things I should know, but I'm going to check.

SUSAN

1:31:38 On, in real time?

COOPER

1:31:43 I appreciate you.

SUSAN

1:31:48 I've definitely had people who like they're like maybe stopped telling people you don't know stuff and then just investigating together. I'm like know people love that... we're on a quest for knowledge together.

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

COOPER

1:32:03 Thank bye.

SUSAN

1:32:07 Let's see.

SUSAN

1:32:12 Yep same deal.

COOPER

1:32:16 We, that's awesome.

SUSAN

1:32:18 Let me show that appointment.

SUSAN

1:32:23 Status, job status I've created, right? So that's for the job, show me the invoice.

SUSAN

1:32:35 History. Yep. It's right here. No one's clicked on it. So there's nothing there, but if they had it would be there.

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

COOPER

1:32:45 There's no more of that. We never got the invoice.

SUSAN

1:32:49 We were...

COOPER

1:32:49 Opened it yesterday at 320 PM.

SUSAN

1:32:53 Like, why are you stocking me? Cooper? I'm like shut up and pay it.

COOPER

1:32:57 Yeah, exactly.

COOPER

1:33:01 What I'm...

SUSAN

1:33:02 Insign up for my customer relations webinar after this?

COOPER

1:33:11 Set up a.

SUSAN

1:33:12 That's the title, but...

--- Pricing ---

SUSAN

1:33:14 Yes. So all.

SUSAN

1:33:15 That would be a fair, but going.

SUSAN

1:33:18 Back to the right pricing for you guys.

SUSAN

1:33:25 There we go.

SUSAN

1:33:25 Too many tabs. So, we talked about the service portal. We, do you guys ever need to do sub cons?

COOPER

1:33:36 Once in a while.

SUSAN

1:33:38 You can, with that, I think it's something like it's either like three dollars a job or four dollars is something very inexpensive, but that comes with the premium option as well, multiple TS and CS the ability to have multiple pricing contracts.

--- Pricing ends ---

SUSAN

1:33:54 So, we talked about all the project management features that you saw. I'm gonna send you a link that walks through that better, that actually has some stuff that's been done. So you can see that it's kind a little custom walkthrough.

SUSAN

1:34:07 And then...

SUSAN

1:34:09 You've got 24 seven us based emergency support as opposed to the core business hours that's what I would recommend giving you all needs.

--- Pricing ---

SUSAN

1:34:20 So, in light of that, let's have excel do some math for us because I don't do math publicly. So, in terms of licenses out in the field six, correct?

COOPER

1:34:37 Yeah.

SUSAN

1:34:41 So...

SUSAN

1:34:42 Our minimum is five. So always have it this way. Five plus one gets you to six, six times, 12 times, one 39 takes you to 10 eight.

--- Implementation and ongoing support ---

SUSAN

1:34:51 And then we take onboarding super seriously. So onboarding you're getting a dedicated onboarding project manager. You're not going to get somebody one week, somebody different the next, and we actually block specific, you know, slots for onboarding. So they're not overly taxed that's going to be a weekly phone call with them access to them over e-mail you're getting a specific certifications that folks can do in, you know, their own time with videos that's how I learn service trade. There's. One for text one for office workers. You also get a demo account to play as you learn. And that's going to be also your project manager helping you get your data at, you know, getting your customer information out and getting that into service trade. So that when you go live day one, at the end of the 90 day onboarding period or sooner if you would like.

--- Pricing ---

SUSAN

1:35:41 It's...

SUSAN

1:35:42 Going to be clean and nice and we're starting afresh. So that's what that 3,500 dollars is going towards all in, we're looking at year 113 five eight. Of course, you never pay the onboarding fee again. And then after you're fully onboarded, you get access to, of course, you know, customer support like we talked about, but you also get an account manager.

--- Pricing ends ---

SUSAN

1:36:05 They're going to be checking in with you roughly monthly to make sure that you're using the full value of service rate, they can actually go into the back end and be like, hey, I'm noticing you guys really drop down the number of quotes that you're sending out. Do you guys need help with that? Or there's fewer deficiencies being reported, your pictures being added, you know, guiding you through, making sure because, we want to find folks that can be customers for multiple years as opposed to, you know, just trying to get folks in the door initially.

SUSAN

1:36:39 Is this kinda in the realm of expectations?

--- Accounting integrations ---

COOPER

1:36:45 Yeah, yeah. I mean, it's pretty on brand with the other stuff we've looked at so far, so.

SUSAN

1:36:52 A very good. Well, I...

SUSAN

1:36:54 Of next steps. I talked about all this stuff. I'm gonna e-mail you and I forgot to ask, are you all using Quickbooks online or desktop?

COOPER

1:37:02 On desktop?

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

SUSAN

1:37:04 Top very good. I'll send you a link that you can share with other folks that are more involved on that side of what it looks like to get the invoicing information from service trade into your accounting system so they can review that as well, send you

the recording, a three minute overview of workflows for folks that don't wanna watch the full shebang, the project management kinda walkthrough that goes into that in more detail. Of course, all the pricing information, helpful links as well in terms of, you know, next steps.

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

SUSAN

1:37:39 When...

SUSAN

1:37:40 Are you thinking you're probably going to have time to like review and digest with Bobby at L?

COOPER

1:37:50 I would say realistically, it's gonna be a couple of weeks at this point. He's out of the office this entire week and then next week is kinda up in the air. You might have to travel next week too. So.

SUSAN

1:38:08 So, it's so much nicer for someone to be like let's be real. Let's do this instead of like me calling like every five days bother.

SUSAN

1:38:16 But...

SUSAN

1:38:17 So, I'm not sure if you saw this in the initial invite, but our scheduling software has the ability that you can go in and click reschedule, but I'm wondering if perhaps like the afternoon, you said a couple of weeks like the afternoon of the nineteenth might make sense to go ahead and put something on the calendar and then you can adjust as needed.

COOPER

1:38:39 Yeah. Let's just do that and then we'll get with him and see what we can.

SUSAN

1:38:44 I'm so sorry, I don't know why I did not see the thing on my calendar for that afternoon. Could we do the afternoon of the twentieth?

COOPER

1:38:54 Yeah, yeah, that should be fine.

SUSAN

1:38:56 Okay, perfect. Well, I'll put it on for the same time. So, four o'clock your time?

SUSAN

1:39:03 A clock nine?

SUSAN

1:39:06 For the twentieth?

SUSAN

1:39:12 And yeah, just bring any questions that you guys have, and we'll talk then.

COOPER

1:39:21 Okay. That sounds great. Thank you very much.

COOPER

1:39:23 Thank you for your time. I appreciate it.

SUSAN

1:39:25 Absolutely. You'll have a great next couple of weeks. Feel free to reach out if you have any small amount of questions and we'll be talking soon.

COOPER

1:39:34 Okay. That sounds like a plan. Thank you.

SUSAN

1:39:37 Thanks. Have a good one you.

COOPER

1:39:39 Too. Bye bye.

The End