



Starr Mechanical & ServiceTrade Consultation

Joseph Summerell with Starr Mechanical
Recorded on 9/14/23 via Zoom, 1 hour 18 min.

Participants

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OTHER

Phone Caller #1

14073176197

Topics

<i>Type of work</i>	11:09
<i>Parts management (purchase orders)</i>	12:19
<i>Access to information</i>	15:10
<i>Paper process</i>	16:05
<i>Parts management (purchase orders)</i>	19:15
<i>Invoicing</i>	21:47
<i>Quote templates</i>	22:16
<i>ST app contracts and pricing</i>	22:40
<i>Accounting integrations</i>	23:30
<i>Accounting integrations</i>	24:40
<i>ST app contracts and pricing</i>	25:19
<i>Parts management (purchase orders)</i>	25:38
<i>Customer engagement (quoting and invoicing)</i>	26:16
<i>Quote templates</i>	26:33
<i>Invoicing</i>	28:31
<i>Type of work</i>	30:59
<i>Recurring maintenance</i>	32:19
<i>Assets</i>	33:15
<i>ST app contracts and pricing</i>	34:10
<i>Purchase decision</i>	34:45
<i>Type of work</i>	36:13
<i>ST app contracts and pricing</i>	36:38
<i>Dispatch</i>	37:00
<i>Tech On-site</i>	37:21
<i>Assets</i>	37:48
<i>Customer engagement</i>	38:18
<i>Deficiencies</i>	38:37
<i>Customer engagement</i>	38:56
<i>Accounting integrations</i>	39:41
<i>Assets</i>	40:00
<i>Customer engagement</i>	40:41
<i>Quoting</i>	41:10
<i>Customer engagement</i>	41:29
<i>Recurring maintenance</i>	42:30
<i>Assets</i>	43:21
<i>Customer engagement (quoting and invoicing)</i>	43:43
<i>Invoicing</i>	44:03
<i>Assets</i>	44:48
<i>Paper process</i>	45:26

<i>Quoting</i>	46:06
<i>Quote templates</i>	46:39
<i>Customer engagement (quoting and invoicing)</i>	47:24
<i>Recurring maintenance</i>	47:47
<i>Assets</i>	48:06
<i>Assets</i>	49:01
<i>Recurring maintenance</i>	49:24
<i>Recurring maintenance</i>	52:28
<i>Assets</i>	52:56
<i>Parts management (purchase orders)</i>	53:31
<i>Parts management (inventory)</i>	55:02
<i>Deficiencies</i>	56:35
<i>Quote templates</i>	58:25
<i>ST app contracts and pricing</i>	58:45
<i>Quote templates</i>	1:00:44
<i>ST app contracts and pricing</i>	1:01:05
<i>Quote templates</i>	1:03:13
<i>Customer engagement (quoting and invoicing)</i>	1:03:45
<i>Quote templates</i>	1:04:07
<i>Paper process</i>	1:04:50
<i>Quoting</i>	1:05:13
<i>Customer engagement (quoting and invoicing)</i>	1:05:47
<i>Customer engagement (quoting and invoicing)</i>	1:07:18
<i>Quoting</i>	1:08:21
<i>Accounting integrations</i>	1:10:31
<i>Quoting</i>	1:11:04
<i>Implementation and ongoing support</i>	1:13:26
<i>Purchase decision</i>	1:17:10

Transcript

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JOSEPH

0:00 I did.

BRIAN

0:02 Buddy. How are you?

JOSEPH

0:04 I'm all right. How are you doing?

BRIAN

0:07 Been a morning man. Been a morning?

JOSEPH

0:10 Alrighty.

BRIAN

0:11 Yeah, but didn't show up. My freezer died. There's people in the house doing stuff. So, I'm in a different location than normal. So, yeah, yeah... I had pipeline with Megan this morning. So, yeah... I got back from Carol like 10 minutes, 12 minutes before happen, and then she's like, so what do you want to go over? And I was like, I don't have any. I did some work yesterday, but I was planning on doing it this morning and I wasn't expecting the best not to show up. So, yeah, it's been.

JOSEPH

0:50 How does bust, is that like a super rare thing for it not to show up. How does?

BRIAN

0:55 No, no, it's a pretty common thing. They have horrible bust issues strikes not showing up. So, yeah. So like I sent.

JOSEPH

1:09 The kids without a parent hanging out at the house.

BRIAN

1:14 A lot of them, a lot of them, like, so there's like seven to eight kids that are on the same. But as Lawson, and like four of them, half the time when this happens, they just start walking to school. So, yeah, like, I don't know how they do. I don't know how parents that like send their kids off to the boss and then go to work. Like how they do it? I don't know.

JOSEPH

1:39 That is while.

BRIAN

1:42 Yeah. So, and then I get in the line. I seen Lawson out early because I was like, I have this meeting with Meg. I gotta go and I try to cut and get out of the traffic and the guys like you can't do that. That's why we have cones and I was like, well, if the bus showed up, I wouldn't be here.

JOSEPH

1:55 So...

BRIAN

1:56 I was like, I'm not trying to be a Chuck about this but it was like I shouldn't even be here right now.

JOSEPH

2:02 Yeah, I gotta get moving.

BRIAN

2:06 So, I literally just got off the phone with her 10 minutes ago. So she was good. She had the link. I got the new, I got a new e-mail, for her now too instead of the accounts one that nobody seems to look at. So I've got her personal e-mail now too. What?

JOSEPH

2:23 I'll throw it.

BRIAN

2:24 Into the Ferris at star mechanical that I hadn't had a chance to update yet?

JOSEPH

2:32 You just like it?

BRIAN

2:34 Yeah. Let me make sure I got it, right?

BRIAN

2:56 But she said she was good. She said that her computer wouldn't let her talk. So I gave her. So we was like, well, that's why we have the phone number so you can dial in and talk through your phone. So, she was all good. When I hung up.

JOSEPH

3:08 I'll here in a minute.

BRIAN

3:11 Was very appreciative of the help. She called me. Hun. She was like, thanks hon. I appreciate.

JOSEPH

3:29 Would it make you? Marti did the same?

BRIAN

3:33 Called me hun, it would make my day J.

JOSEPH

3:40 The mobile cabular. Any?

BRIAN

3:43 You... can't hear you can't hear the dogs barking in the bar. Can you? Okay? Yeah, there, we got people here doing some stuff at the house and hopefully get my feet. Yeah, we had a scramble yesterday afternoon. We had to take everything to a friend's house in the freezer. Do... we had just bought a crap ton of meat and that all frozen for just whenever we decided to. And then we were like that's...

JOSEPH

4:13 Well, if you need a place to put anything, I've got a chest reason that's only about half full.

BRIAN

4:19 We've got a friend that's got one too that we throw it all in. But if he's supposed to be here tomorrow to fix it or to at least tell us what's going on. So, it's kind of a potentious place that we have the food. So, if they throw a fit, I'll might reach out to you and take you up on it. It's not much. It's like a cool.

JOSEPH

4:36 Easier to also just like replace those things. I feel like, I think I got my chest freezer at costco for 202 150 bucks.

BRIAN

4:44 We've talked about it because my mother in law likes to, likes the farmers markets and she's like every time, she comes with like peas and meats and

everything else. We just don't have any place in our house to put it.

JOSEPH

4:58 Yeah.

BRIAN

4:59 If we had a place to put it, we probably definitely would have invested it, but it's like if we had a garage, we would, you know, it would be easy to throw in there, but we just don't have a garage.

JOSEPH

5:09 Yeah.

BRIAN

5:10 So...

JOSEPH

5:11 Our part in the garage is like when it's out there, sometimes I just forget about things that are out there and they're in there forever. Like Claire has her whole bouquet from our wedding in there.

BRIAN

5:23 Really? Yeah, that's...

JOSEPH

5:25 What are you planning on doing with it? So I don't know, but I feel like it will keep better in there and I...

BRIAN

5:33 You're going to have that?

JOSEPH

5:35 That freezer space until I come home with a bunch of meat and then I'm getting rid of it.

BRIAN

5:41 You can have the bouquet there as your center piece when you have your one year anniversary, when you eat your cake or?

JOSEPH

5:48 Yeah. We have cake in there too.

BRIAN

5:52 Yeah, it was, I remember eating the cake on the one year anniversary, was... it was interesting?

JOSEPH

6:02 When my grandmother died?

BRIAN

6:06 Three?

JOSEPH

6:06 Four, four years ago, now... she had a piece of cake from their wedding in 19...
53. I think 54 and she had kept a piece of their wedding cake the entire time.

BRIAN

6:31 I don't even know what to say.

JOSEPH

6:34 I just, I don't know how like I mean, given they only moved once. So, she was a fun quarter. She had every single southern living in national geographic from like the fifties to the nineties, just sitting in her at for the reason.

BRIAN

6:52 Good lord. Yeah, it's like my, when my parents moved to gastin... my mom, Whitney had to go through and tear through all of their stuff because in the past like four years before that my, both my grandparents had passed away and my great aunt and great uncle passed away. So like everything that they had went to my mom. So she had like three pictures of like my first great yearbook class, you know, she had all, the kid pictures she had like triplicate of it. And she was like, I don't know if I want to get rid of it. And, and I finally, I looked at mom's like have three of them keep one throw two away or for four away, however many had you only need one. So that.

JOSEPH

7:37 Go of that stuff. I mean, my mom was going through a bunch of stuff a couple of weeks ago, and he sent me a picture as like.

BRIAN

7:46 Keep all this and it's like.

JOSEPH

7:48 Finger paintings from four year old pre school that you put in a box in. No, I have no reason to want that.

BRIAN

8:00 Yeah, like when my brother moved into the house, we grew up and I guess his wife went tearing through stuff and in the process, she found like a bunch of my old like high school crap, like my letterman jacket, like my old letters and like, my, and she just like showed up at my house one day on like my birthday and was like here. And this is a giant box of like my high school and younger stuff. And I was like... what makes you think I want that?

JOSEPH

8:28 That stuff is cool. I mean... like my mom was going through a box of letters that my grandfather sent to his mom in reward too, and like going through all, that, those are cool. But.

BRIAN

8:42 Yeah, no, yeah, yeah. 100 percent.

JOSEPH

8:53 Tina. Good morning. Can you hear us?

JOSEPH

9:00 She must be connecting.

14073176197

9:01 Audio...

JOSEPH

9:49 Tina. How's it going?

14073176197

9:53 I'm well.

JOSEPH

9:55 Great to hear. Thanks for joining us this morning.

14073176197

10:03 I just sound everything. Okay?

BRIAN

10:06 What was that?

14073176197

10:09 Okay.

JOSEPH

10:10 Yes, ma'am, I can hear you. Fine. Can you hear us? Yes, great. Well, thank you, for joining us. Brian is, on the phone as well. And I'm Jay, summarel, I'm the territory manager, sales rep for the southeast over here at service trade. So, it's great to virtually meet you and hopefully we get to meet in person sometime soon.

14073176197

10:36 Yes, yes, yes, yes.

JOSEPH

10:38 Really? What I planned out for today's meeting is to just kinda talk through exactly what it is you're looking for, what may not be going as smoothly as you'd hope right now and then talk through a little bit about kind of, the 30,000 foot view of what service trade does to make sure it is really worth a real deep evaluation with you. And Justin, does that sound like a good plan?

--- Type of work ---

JOSEPH

11:09 Awesome. Yes. So right now...

BRIAN

11:15 How many?

JOSEPH

11:15 Technicians, do you all have at star mechanical? Doing service and maintenance and projects and... all of that?

14073176197

11:26 Is about 35?

JOSEPH

11:29 Okay. And what's the breakdown of that in like in regards to how many are doing service? How many are doing maintenance and how many are doing projects?

14073176197

11:42 My service and maintenance guys. Kinda go together. I have four project managers... right now... I would say behind that?

14073176197

12:02 I'd say at least 25 to 28 would be... our service and Installation.

JOSEPH

12:10 Okay. So, that's a fair number of takes running around and that you have to keep up with a lot of moving parts.

14073176197

12:19 Yeah, yeah.

JOSEPH

12:23 So, what percentage of... I'm sorry, I cut you off.

14073176197

12:29 All right. I said, yeah, they all have access to the program. So, and that's where we also keep up with all of our purchase orders, their time. We use BuildOps for, our timing and material.

JOSEPH

12:45 Okay. And how are those processes going in build ups? Are the purchase orders in time working well?

14073176197

12:59 Little hiccup there? Because of the way that we do our purchases, our techs are able to... trying to get them to be more user friendly with the program. So we can keep up more with the purchasing... a little hiccup back and forth with the guys, you know, being able, we allow them to go out and like if they go to a job and need a part, we allow them to purchase that part. But unfortunately, there's a couple of things missing and that's one that. So, our service manager is not able to... kinda help keep up with what's being ordered and what's placed on order, or what's being held on order.

14073176197

13:51 I don't know if that has to do with internal, you know, with the guys not putting in enough information to let... back forth with their service manager, I would like to come up with a better system on the po system so that the service department has more control of what is being ordered... versus having to wait, you know, for an invoice to come in from that tech or from our vendor to say, okay, well, we ordered this back then I haven't got it or it's on back order. So, yeah, some of that may be some hiccups that we're having internally the... but I would love to be able to get a better grip on that. So everybody's at and that, and it wouldn't matter who looked at the account that they would know that there was something it'll being ordered or I'd be in place to order or needed to be placed to order.

BRIAN

14:51 So...

JOSEPH

14:51 Right now, are, the technician, can you kinda describe to me the way a technician orders those parts? Are they cutting the po and going to the part as

themselves? Or are they calling the office for a po and then writing that down in notes in the work order? What does that look like?

--- Access to information ---

14073176197

15:10 Yeah, kinda sorta that's kinda what they do. They'll go to the service. We have the program where they can put notes in... but again, they're not utilizing the note enough for, you know, for us to be able to feedback. And I don't know if it's because it's just not user friendly for them enough or they're having then maybe an issue on the phone app.

--- Access to information ends ---

14073176197

15:36 I've never used the phone app before, so I'm not really sure what that in details on their side and what it looks like yet. I've just been in the seat since March. So I have picked up... the cleaning up more of our Ar, or a, you know, the account table side and I have our accounts payable side. So I haven't got involved that much yet with it.

--- Paper process ---

JOSEPH

16:05 Okay. How...

14073176197

16:06 The whole protocol and how the whole thing... but I do know that it is a little out of control and I would like to be able to find a more user friendlier type program to where maybe our office is pulling those. So they know, you know, our service manager or dispatch or whoever is ordering this part, but have a little bit more control on what's on order, what's on back, order, what, you know what I mean? And what they received. So right there, like a little free for all. And, I just feel like we need to get a better system on that.

JOSEPH

16:49 Yeah. We, we hear that a lot with folks cause keeping up with parts. Is it's so tricky because, if you miss something on billing, you can't really go back and say, hey, mr. Customer. I'm sorry, we didn't get our invoice in time before we build, you, can we Bill you again? That doesn't go over. Well. Does that, is that the kind of things you're trying to avoid by getting these processes straightened up?

14073176197

17:16 Exactly. So that be one of the bigger, you know, one of the other like the other said is communication between the text and the service manager or, a dispatcher.

--- Paper process ends ---

14073176197

17:28 So you get, and... any program you should be able to go in and look and say, hey, okay. Well, this is what's going on with your account? Because when a customer calls in and like for anybody here that would answer the phone, if they can't go in and say and give them an answer that's kind of a little embarrassing, especially your company. I.

JOSEPH

17:48 Hey, we're waiting on as.

14073176197

17:50 Will have this under control. But unfortunately, with some hiccups and changes to people here... that's not.

JOSEPH

18:01 Make...

14073176197

18:02 It make it.

BRIAN

18:05 Our, our...

JOSEPH

18:06 Customers tackle this a couple of different ways. I mean, there's 100 ways to skin a cat in this instance because some folks want their technicians to be able to cut the po, and then just put, hey, I order these parts. This is what, they should show up and then have it go. All that data, just get kind of pushed back to the office so that they can see everything and then update the cost.

14073176197

18:35 This is my boss and I got to answer him real quick, so.

JOSEPH

18:38 Yes, Ma.

14073176197

18:41 Hey, Justin.

JOSEPH

18:43 You're still one with us, Tim?

14073176197

18:58 We need to act on that pretty quick. We can make them wait until the nine day, you know what I mean? But we still need this response for nine days.

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

14073176197

19:15 I definitely know. So, yes. All right. You got it. All right. Sorry about that. Go ahead.

JOSEPH

19:26 No worries. So... what I was kinda talking through, is there a couple of ways, to handle, the parts? Would you prefer a technician to be able to cut a po in the field, at least get a po number so that they can get the parts that they need. And then it goes back to the office to, with the information about, hey, this is what I ordered here's. A picture of, the pick ticket from the vendor. This is what day it should show up or would you rather the office be entering that stuff in and then giving them the po?

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

14073176197

20:02 If that would utilize it and make it their job easier. I wouldn't mind for the text being able to do that. So at least we would have some communication here and knowing exactly what's going on per account.

JOSEPH

20:16 So, as long as it's easy enough to do that, the technicians actually put the data in.

14073176197

20:22 Yeah.

JOSEPH

20:24 Okay.

14073176197

20:25 I noticed on the majority of our Texas on certain things and yeah, they would use it if it was more user friendly, I guess in this program, we're teaching them how to build this program and it just cost it cost a hiccup.

JOSEPH

20:42 Yeah.

14073176197

20:44 But we're at a point that they don't give us any breaks either, you know? And here we're giving them all the feedback on what to do with their program to help

them help us.

JOSEPH

20:56 Okay. And you're paying a big chunk of change to do, so.

14073176197

21:01 Right.

JOSEPH

21:04 No.

14073176197

21:05 And I back, you know what I mean? I've had this problem with them. And then like the whole month of may, when I told, it took over the seat in March, the whole month of may, I had nothing but glitches. And it set me back and set me back by week. Now to this day. Because of that one month, I am a whole month behind on posting.

JOSEPH

21:26 A whole month behind on what?

14073176197

21:29 My posting of ap because everything caught up. And, and again, like I explained, I think the one of you guys before that, there's just so many processes I have to go through to put one invoice in. What I mean, it's not a simple task.

--- Invoicing ---

JOSEPH

21:47 So, can, do you mind walking me through that I wanna, just so I can better understand how you go from, hey here's, a completed work order... to all right, let's send an invoice. What, what are the things that are slowing that process down?

14073176197

22:05 One posting or vendor payment and invoicing because we do parts of material in the service department which I have a kind of an issue.

--- Quote templates ---

14073176197

22:16 The way they're doing that right now because they are waiting on parts in this industry, we should have a set price on what we're charging for parts and labor, whatever we do parts, they wait for those parts to come in per item, then they do their markup... put things down.

--- ST app contracts and pricing ---

14073176197

22:40 Now, they're waiting on a piece of paper to show up... that was ordered to be processed in order to do their billing. And I think that regardless, okay. And I'll use a sample, a capacitor... prices, you know, whatever style or size they are... that should already have its markup price, and that item should already be in the system with this markup price with it.

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

14073176197

23:14 But I mean, so it's like I think was spoiling our customers a little bit too much by giving them wait too much information on the parts instead of just breaking it down for part of the material because we give them a description of what we're doing. So when, if you... share by my screen and you would see how their invoicing would go from the whole process is just out... be that much... or say like a Quickbooks program.

--- Accounting integrations ---

14073176197

23:46 But I mean, that, which is more of an accounting program, not a service program, but it's more of accounting. But it can be designed as a service if it's utilized properly.

--- Accounting integrations ends ---

14073176197

23:55 Basically, you would go in, you know, you're ordering a competitor and, you know, how much that's gonna cost you to be no time to wait, post an invoice to build that customer. We don't fill them at the door nor does our program offer us that right now to do that either. So basically, we get signatures for service, but we don't get signatures or, you know, I hit miss on the signatures too.

JOSEPH

24:26 Right.

14073176197

24:27 We pull the, yeah, then we end up pulling those notes in together... when we go to our billing.

JOSEPH

24:35 Are you billing out of BuildOps or an accounting platform?

--- Accounting integrations ---

14073176197

24:40 We're using BuildOps for everything trying to.

JOSEPH

24:44 Even even like all the accounting functions?

14073176197

24:49 Yeah, we're just doing time and material... purchases in, the build program.

JOSEPH

25:00 Okay. I think.

14073176197

25:02 Give, they kinda give us the cost, the accounting and, the master part of accounting is done out outside of that into Quickbooks. So everything's faded over into Quickbooks.

--- ST app contracts and pricing ---

JOSEPH

25:19 So, you need a better way to keep up with the database of what all of your standard items cost so that you can quickly say, all right, this should be a 45 dollar capacitor. I'm gonna have my, it marked up 50 percent and I need to get that Bill out today.

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

14073176197

25:38 Yeah. I would like to step up on our service billing for sure. And somewhere on the line instead of like I said, instead of waiting for a vendor invoice to see actually what that all those parts cost, I mean, sorry, generally have a general idea of what that's gonna cost.

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

14073176197

25:58 I don't think we should have to break down every single individual part per item per rate, actually send it to this. You know what I mean? I've been in service industry, but I've never been on like this side to me. It's like almost micro managing but not, you know what I mean?

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

JOSEPH

26:16 Right. I think what a lot of our clients do is they'll keep up with the cost of individual parts for job costing.

14073176197

26:23 I did that. Yeah.

JOSEPH

26:26 Then when it comes time to send the Bill, it's more of a summary of hey, either some people just send the grand total.

--- Quote templates ---

JOSEPH

26:33 Some people split it between here's. How much in parts here's, how much in labor here's, how much in, I don't know fees, if there's a permit or something like that you need to pull... just to keep it simple. Because as they say, where there's mystery there's margin. And if you list out every single part, customers go on Amazon and see if they can find it cheaper and ask you why you're charging so much?

--- Quote templates ends ---

14073176197

26:58 Exactly. That is my issue right there. And you're exactly right?

JOSEPH

27:02 So, right now, you don't have the option to send it kind of as a consolidated invoice of parts labor other.

14073176197

27:12 We do. I mean, the program does allow that. I just put the service department again. Like I said, that is a little internal situation there that we were having to... because they've never done the billing before. They always had somebody else doing it even before that person did it the same way. I think as far as that kinda goes, that's a little bit more in terms that we would have to come together in a group to see that this is the way we really should be doing or going.

JOSEPH

27:52 And not that way. Yeah. Well, I can send you, some studies we've done with current customers about how they've been able to speed up their invoicing with service trade and that'll be something good to talk through when we're when we do our full on demo, I can walk you through what our process is and really... how service trade has helped customers just speed it up because, we try and have all that cost information in there as the technician is completing the work order. So you can get the Bill out next day or at least within a week because a month is a month is a long time.

14073176197

28:31 Yeah. And, and me, when I look at it at accounting standpoint, anything that's not built in that month is lost for that month. You know what I mean? Whether it be revenue or, you know, expense, it's lost if it's not posted.

JOSEPH

28:45 Yeah. Not only that, I mean, I know how adhd I can be, if something happened a month ago and I'm just now getting a Bill for it, I might have forgotten what it was for, you know, people are a lot more likely to pay and pay quickly if it comes within the same within the next few days because it's all fresh on their mind.

14073176197

29:08 Right. Or if they even have something in their face that they can pay from then that.

JOSEPH

29:15 Better. Yeah, we do have mobile invoicing.

14073176197

29:18 I would like to happen. Yeah, that's what I would like to also be able to see happen in our service department to where we were not having to wait for payments to where some of these customers if they don't have like a long term history with us or an account with us to where, you know, we build a monthly or something of that nature... to have that access to be able to pay. Then instead of having to wait.

JOSEPH

29:43 That kinda leads me.

BRIAN

29:44 Into...

JOSEPH

29:46 I'm sorry, go ahead.

14073176197

29:48 We don't even have that to offer them the service right now. Either they go, can't say, hey, well, okay. Well, you can give us your credit card now and we can run it because that now is, I don't know if service site could do that as well. But right now, we're having to run those through Quickbooks. I don't have any other credit card... access right now that I have looked into to be able to see if... such a thing does work that way as well.

JOSEPH

30:18 And that poses issues when you're running some invoices through Quickbooks, others through BuildOps, and then where do I mark it as paid? And is it reflected everywhere that sort of thing?

14073176197

30:33 Basically, what we do is pick up the payment. Yeah, Quickbooks runs the credit cards, say we run the credit cards through Quickbooks. But then we don't have to go back over to build off posted as, you know, and run it as we're paying it over there to clear it off the books over there... really keeping up with two different types of accounting system to a degree. But my master would be Quickbooks.

--- Type of work ---

JOSEPH

30:59 Right? As it should be.

14073176197

31:00 You know, accounting information.

JOSEPH

31:05 So, one thing you mentioned was monthly billing... is that monthly billing for maintenance contracts. Yeah. Okay. How much?

14073176197

31:16 Medium right now, basically, we do, we're just starting to pick back up on that stuff. We quit all of our residential. We're mostly commercial and industrial. We do like a lot of hotels, schools... very large projects of that nature.

JOSEPH

31:35 Okay.

14073176197

31:36 Backed out of residential. So residential is not an issue, but we do have these restaurants that we go to or like golf courses or, you know, places and facilities like that would be able to have the capability to pay if they wanted to pay on the spot.

JOSEPH

31:56 So, you said you're focused a lot on projects right now, however you're looking to boost the maintenance contracts? Are you looking to just sell maintenance contracts to the folks that you're doing projects for?

14073176197

32:09 Well, we thought about that. We had, a gentleman in the seat for that, but we're in the market of looking for someone else at this moment that didn't work out for us very well.

--- Recurring maintenance ---

14073176197

32:19 He has to... apart from us. And so that part of our business right now is kinda... got some, but it just got a lot.

JOSEPH

32:34 So that's one of the things that service, it really focuses on is the, those maintenance contracts, selling them, delivering on them, keeping up with the schedules of when certain PMS are due... what was your salesperson using to go, and sell maintenance contracts?

--- Recurring maintenance ends ---

JOSEPH

32:52 Were they, did they have like excel templates to build those out or what did that look like?

14073176197

32:59 They had actually purchased the program... that did that for them?

JOSEPH

33:07 Do you know what it was?

--- Assets ---

JOSEPH

33:15 Okay. I'm not familiar with that one.

14073176197

33:24 They were able to go in and... it would give them all the, where they could do all the bidding tools of whatever it would cost for, you know, depending on the type of units, how many units filter oil belt, all that different type of things.

JOSEPH

33:44 Okay. Cool. Well, yeah. If, if server strain is something that you are thinking about moving forward with, we have a, we have a tool as well that makes it super simple to quote projects and maintenance contracts where you can use your phone scan in the make model, serial number, and then, it will generate proposals based off of astray data especially, for the maintenance contracts.

--- ST app contracts and pricing ---

JOSEPH

34:10 So it'll understand, hey, this is how much time you need for a rooftop unit and these are the filters you're gonna want to change. And then it can spit out a proposal that says, all right. Do you want a full coverage PM contract or a labor only pay for parts that?

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

JOSEPH

34:26 So that has different options for the PM contracts and it makes it super easy for somebody without a ton of experience to build those out and do it quickly. So, you can get a lot of business out of a single sales person rather than needing a whole team.

--- *Purchase decision* ---

14073176197

34:45 So, you said you had a demo that you could show?

JOSEPH

34:48 Yeah, absolutely. Let's see if this is the right fit. Is this something that you all would want to be changing over the winter to try and be live before summer? Or have you and Justin had any conversations about that?

14073176197

35:06 He's basically looking into other programs and just, he hasn't had a long, you know, a lot of time to be able to review these programs. But... hi, is looking not very happy with the way build off is working out.

JOSEPH

35:22 Gotcha.

14073176197

35:24 So, you are looking, but.

JOSEPH

35:25 Don't have any definite time line on when a change would happen?

14073176197

35:30 Right. It would be a detailed program that was suitable for our company's needs cash and feasible.

JOSEPH

35:38 Okay. Well, we'll see if we can check off some of those boxes. Can you see my screen here? Yeah, great. So I'll show you a little bit about service trade and then we'll jump into the software itself.

--- Purchase decision ends ---

JOSEPH

35:51 So when it comes to service trade, we have two main focuses of our business one helping you control costs better and two growing quality revenue. So when it comes to controlling costs, that's a lot of the processes around better scheduling and dispatching, better ways to keep up with what parts cost.

--- Type of work ---

JOSEPH

36:13 So you don't have any leakage there or don't miss billing certain things. But then service trade also has a big emphasis on growing revenue. So helping you sell more service agreements, helping you up cycle your customer base. So you're working with more of those hospitals and schools rather than strip malls and people who are just cult to work with things like that, right?

--- ST app contracts and pricing ---

JOSEPH

36:38 So this wheel kind of exhibits the different sides of service trade. So with office coordination, we have simple ways to show whip reporting. So you can keep up with, a budget for a job. You can see how you're doing to that budget. And then it'll have visual queue to say, hey, we're going over on labor.

--- Dispatch ---

JOSEPH

37:00 Hey, parts are more expensive than we estimated things like that. So we have a big focus on that office coordination. And then when it comes to maintenance contracts or reactive service, we have advanced scheduling and dispatching board that you can use with a map on it. So you can see, all right, well, this is actually a pretty good route for my technician to take.

--- Tech On-site ---

JOSEPH

37:21 Or if I have an emergency call two hours away, what else can that technician hit to make the most of rolling a truck all the way out there? Things like that?

JOSEPH

37:33 When it comes to technician productivity, we've streamlined our mobile application so that they can get all the information they need, right in these tiles is what we call them, but that will show them what they need to be doing today.

--- Assets ---

JOSEPH

37:48 It will show them any location comments. We'll keep up with the assets. So make model serial number. We can have pictures, videos, PDF, repair manuals, wiring, diagrams, all that tied into there. And this is all set up so it can be available offline. So if the technician is down in a basement or in a rural area, they'll still be able to document everything and see all the history that they need.

--- Customer engagement ---

JOSEPH

38:18 Any questions there? All right. When it comes to customer communication service trade is big on taking what it is that the technician is doing in the field. You can filter through the office if you want to, just to make sure you're sending the right thing to the customer.

--- Deficiencies ---

JOSEPH

38:37 And the wrong picture doesn't show up for them. But we have a great way to show the customer. Hey, this is what we did on site today. These are the pictures in the videos here's. Some deficiencies or repair opportunities that we found. We might want to go ahead and start thinking about those so that you can quote them out.

--- Customer engagement ---

JOSEPH

38:56 So, the customer engagement online is huge. We have a customer portal that we can embed into your website so that your customers can see what jobs are coming up, what's been recently completed, open quotes and invoices, all of that straight through your website, if you would like. Do you work with a lot of property management groups?

--- Customer engagement ends ---

14073176197

39:22 That's awesome.

JOSEPH

39:25 Yeah. Our customers seem to really like it. What, what jumps out at you about that, how would that be helpful for you?

14073176197

39:33 Well, the customers have control too as well. They get to see their invoices or see what, you know, what, exactly what you said, what's coming up?

--- Accounting integrations ---

39:41 What's do, what they need to pay, they have access to. I mean, myself, I know I like that with our vendors that we use and they're using more portals and more portals and more portals now versus the old fashioned way. So that to me, I think is a big tool.

--- Assets ---

BRIAN

40:00 Very nice.

14073176197

40:00 Customers in and, you know, look at the, look at their own accounts that's nice.

JOSEPH

40:08 And as they're planning, capital budgets and stuff, they can even go in and look at. All right, show me all the invoices for my rooftop units, or show me all the invoices for this specific chiller that have come from star mechanical so they can really start to see.

--- Assets ends ---

JOSEPH

40:25 Wow. I've spent way too much money servicing this and they have the data to really understand. All right, I need to get this replaced and, you can show them that data if you're trying to sell them on a new one. But if they're really staying on top of it themselves, they'll be able to see it as well.

--- Customer engagement ---

14073176197

40:41 All right. That's nice.

JOSEPH

40:47 Management visibility is also key. So we have some cool reporting tools to be able to show a lot of financial profitability reports, things like that, things that you would traditionally find in reports, but also reports on how to boost revenue. So this report right here is showing jobs with deficiencies or repair opportunities.

--- Quoting ---

JOSEPH

41:10 So you can start to track hey how many of my maintenance jobs, are my technicians, actually finding repair opportunities of those? How many are being

quoted out, and what's my quote approval rate on that? So you can really start to dial in by technician or by customer type.

--- Customer engagement ---

JOSEPH

41:29 What clients do we typically find the most valuable poll through revenue from? And that can really help grow revenue and grow the business?

JOSEPH

41:44 That took me right into quick site. And then lastly, the sales tool that I was talking about in the beginning. We make it super easy to send those quotes, send those proposals, and also send the pull-through repair revenue or the pull-through quotes with pictures and videos taken from the field. As well. So I'll jump out. Do you have any questions on those slides before I go into the actual software?

14073176197

42:13 But I like the formatting of your.

JOSEPH

42:20 Since the portal jumped out at you, I'm actually going to go into that first. So this is my... this is my fake website art services.

--- Recurring maintenance ---

JOSEPH

42:30 We are a fake commercial service contractor, not really serving central North Carolina. But when I go into the portal, this is kind of what your customer would be able to see. They would see what jobs are happening today, what jobs are coming up across all locations. So if I'm a property manager for cosco, I can see in wilmington and jersey and Los Angeles, and Ali, I can see all the different locations here. And this is all based on, the e-mail address that is associated with that person. So if I had somebody that's just for the cosco and Raleigh, I can limit them to just see that. But then somebody over the whole organization can see all locations. If I click on the job number, it'll take me into what we call the service link.

--- Assets ---

JOSEPH

43:21 That's not a very good example of one. Let's see quarterly to that'll be a better one. So this will have any sort, the appointment details. When things were fixed, if pictures were taken in the field, they'll show up underneath attachments so that the customer can really see what happened on site that day.

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

JOSEPH

43:43 If I click on the invoice amount, it'll take me right into an invoice. That invoice like we saw we're talking about earlier, can be laid out with just parts labor other, or it can have individual line items or it can have the grand total. Only we do have pay now capabilities.

--- Invoicing ---

JOSEPH

44:03 So they can pay with credit card or a CH, if you want them to. And you can create rules around that to say, all right, if it's over 3,000 dollars, I do not want to accept credit card. AC, H is the only option and you can control that on a per customer basis.

14073176197

44:21 That's one thing that they don't have available right now, either you can't...

JOSEPH

44:27 This really helps improve collections. When we rolled out this invoicing a couple of years ago, our customers that switch to it from our old way of invoicing without pay now capabilities and all that they pulled in their D, so by 11 days on average.

--- Assets ---

JOSEPH

44:48 All right.

JOSEPH

44:53 And then, so if I go up here underneath locations, if I want to click on, let's say cosco and Charlotte as a customer, I can also go and request service. So I can click here. And then I can say, hey, I need work on this or to, or this building type in what I need and that I can kick a work order out into... your system. And then lastly, I can also go in here to approve quotes. What was that? I?

--- Paper process ---

14073176197

45:26 That's also another nice tool. That way, you know, everything's in writing. You're not waiting or missing an e-mail.

JOSEPH

45:34 Yup. And you're not having to stop what you're doing to answer the phone, to write it down on a note pad and then hopefully somebody types it in the computer later. It's all there.

14073176197

45:46 We had a hiccup with that the other day. I had to take down a job and I wrote the information down on a piece of paper instead of emailing it like I should have done, and the paper got lost.

JOSEPH

45:59 We're all human.

14073176197

46:01 Yeah. So.

JOSEPH

46:05 Thing happens with quote.

--- Quoting ---

JOSEPH

46:06 So, when a quote gets approved in your system now, how do you get notified of that via e-mail or something?

14073176197

46:14 Well, they're not using the quotes internally as much as they are externally because they, I don't think they have the quote form actually corrected in there for them formatted. Should I say, right? And again, a lot of steps you have to go through to even... set it up.

--- Quote templates ---

JOSEPH

46:39 Yeah, I've heard, it's a lot of clicks on the office side, to build a quote in and BuildOps. So, in ServiceTrade, this is what the final quote looks like. And we can go build one real quick and then we'll we can kinda land this plan for today if you or we can keep going if you have time, but we try and make it as easy as possible for the customer to get in, see what's going on that's all the different line items. I have this one laid out as line items, not just parts of labor but it shows them exactly what's going on with pictures and videos and all that built right into the quote. So that they have, they can see, wow, this is a problem. I need to fix this.

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

JOSEPH

47:24 They're not just trying to sell me on something so they can click approve, check, terms and conditions and approve the quote. All right now, if we're creating a quote, I just jumped to service trade. This is what the office view of service trade is. And I am in a preventative maintenance job... actually I'm gonna show you, the structure of our data at the location page, and then we'll go into this actual job.

--- Recurring maintenance ---

JOSEPH

47:55 So from the location page, I have cosco and Ali, that's underneath cosco corporate headquarters. So I can have a customer with 50 or more locations underneath it.

--- Assets ---

JOSEPH

48:06 If I need to. At this location, I can keep up with all the assets. So make model, serial number, filter sizes and quantities. And then I can keep up with all the work done on a specific asset so that I can easily make good repair, replace recommendations. I can look at the... or I can keep wiring diagrams and things like that per asset in the system so that the technicians have access to it.

JOSEPH

49:01 All right. So I'm in my phone, I'm gonna document a deficiency on this job real quick. Let's click out of that.

JOSEPH

49:14 So, on the, for the asset, this is kind of what it looks like. From the office view, you'll see your make model, serial number, all that, but you can also see the jobs that have been completed on RT number one.

--- Recurring maintenance ---

JOSEPH

49:24 So this is where I can see how much is being spent on it as well as the services for that specific asset. So I can see, hey, we have an annual PM on this unit, estimated price and duration is on there for scheduling purposes. I have a preferred technician tied to that P. M and a window in which I need to get it done. So then I can just run a large report to say, all right, show me everything that I have to do this month and generate all those work orders in bulk.

JOSEPH

49:59 How are you keeping up with? I know you don't have a ton of maintenance contracts right now, but how are you keeping up with those?

--- Recurring maintenance ends ---

JOSEPH

50:18 Jay, she said she.

BRIAN

50:18 Can't hear...

JOSEPH

50:19 Us? I wonder how long I've been talking?

14073176197

51:59 Guys there?

JOSEPH

52:00 Yeah, we can hear you now.

14073176197

52:03 Hey then.

BRIAN

52:04 Where...

14073176197

52:08 About 10 minutes again.

JOSEPH

52:11 My goodness. That's embarrassing. Sometimes I can just keep on talking.

14073176197

52:16 And you, did, I check you, I did your little text thing and I'm just typing away, but Ryan finally got in.

JOSEPH

52:26 My goodness. Why I apologize.

--- Recurring maintenance ---

14073176197

52:28 I didn't know what to do. I was like, I'll snap because I didn't know if those are a one time meeting calls or what?

JOSEPH

52:39 So, this is the preventative maintenance job that we're on here. It is underneath there's cosco corporate headquarters, and then cosco wholesale. And Ali, this job is a PM on, our rooftop unit number one and two.

--- Assets ---

JOSEPH

52:56 So we assign those as individual services so that we can keep up with when exactly everything's due as well as how much money is being spent per asset. So, if I open up the asset page, you can see all the different jobs that have happened specifically on or to number two and I can make a good repair versus replace recommendation or quickly get to any history that's going on with this asset if the customer calls and says, hey, this is Dawn weren't, you're all out here two weeks ago working on it, you can easily see what's going on.

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

14073176197

53:31 All right. I like that.

JOSEPH

53:34 Back on this job, I've got my parts and labor that have been documented saying, okay, we have looks like these belts they came from as parts and service vendor. Under this po, that green box means they are received and good to go. I never updated the cost on that. So let's put 150 in as my cost. But here underneath the source, this is where if the technician cuts a po or if the office cuts a po, all that information will flow right in here so that you can quickly see where it's coming from. What the po is, what the status of that po is, whether it has been received or not. And then, these little colored boxes will tell you that in a visual queue?

JOSEPH

54:30 You still with us Tina?

14073176197

54:32 Yeah. I'm watching.

JOSEPH

54:33 Okay, cool. We also can show when this stuff comes off of a truck. And then that blue box means it is ordered but not yet received. So if this shows up in my stack of work orders to be billed and I see a blue box, I might want a second guess. Does this actually need to be billed? Because I have parts that are not yet received something's wrong here?

--- Parts management (inventory) ---

JOSEPH

55:02 Any, any questions on that?

JOSEPH

55:08 Cool. Do you keep up with inventory on individual trucks?

14073176197

55:17 Well, basically, when we put those in, we don't put them into our BuildOps program, we only put those over into our accounting software. So, you know, we don't know when or when are they're gonna use the?

JOSEPH

55:35 And when...

14073176197

55:35 They do use them and they're pulling from stock, they'll let us know that they pulled from the truck, then we know it's from their vehicle.

JOSEPH

55:46 But that automatically.

14073176197

55:49 Keep stock, try not to keep stock to a degree, but there are some things you do have to keep on your vehicle... but really a fine line of counting.

JOSEPH

56:02 Yeah. So, with service trade, we can keep up with what all is on their vehicle. And then in the field, when they say, hey, I use this belt, it came off of truck four, it can deduct that from the inventory on the vehicle. And then you can set minimums so that, hey, when they did below five belt. So this type, we need to reorder, that sorta thing.

--- Deficiencies ---

14073176197

56:35 As well.

JOSEPH

56:42 All right. So I'm gonna keep going down here to deficiencies. If if the technician is out on a job and they see something that needs to be quoted out, this is how we would get it back to the office to be quoted out. One. It would show up on the work order where the problem was found. It would also show up in an e-mail to whoever is in charge of receiving these emails. So I can see wow deficiency was reported at cosco wholesale and roll. So if you're in charge of this, you can get that e-mail click on the link... and it'll take you right into service trade and show you where the problem was found, what piece of equipment it was found on. It will show you any, if there are any attachments. So any pictures taken out in the field, it will show that to you right here. I'll go ahead and add one. So you can see what it looks like. When the quote comes over. It will also show you related efficiencies. So any other issues that have been happening on this same rooftop unit, it will show you all of that right here. So that if it is maybe a bigger issue that this is all tied in together, you can see that.

JOSEPH

57:59 From here, we click add to.

14073176197

58:01 I notice the years and how long, how old that's nice.

JOSEPH

58:07 Yes, ma'am, so we'll click add to quote and create a quote. So that will create a quote with that deficiency or repair opportunity on it. That way when this quote gets approved and turned into a job and then ultimately completed it'll, go back and mark that deficiency as fixed.

--- Quote templates ---

JOSEPH

58:25 So you have the full history within the system... right now, when it comes to description in parts and labor, we'll need to add that to this quote before sending it out. So I'll add my compressor replacement, a template that will have whatever standard description and parts in labor you think you're gonna need for that kind of repair.

--- ST app contracts and pricing ---

JOSEPH

58:45 We can keep up with all of your cost information with those markup rules applied. And of course, I can edit things as I need to. So let's say this compressor is actually 175 dollars. It'll go ahead and change that mark up accordingly. But it'll flag that to say, hey, this is outside the standard cost for this customer. If you have that set.

14073176197

59:10 I was gonna ask you. So those codes are those unit codes? Are those per customer? Because I know like some customers that we have, we give a discount rated on versus what we would charge across the board for other customers.

JOSEPH

59:23 Yes, man. That's exactly right? So we can keep up with contract mark up rules and contract pricing per customer and per location if you want to. So this one is automatically applying a cosco PM contract... because I'm doing work at cosco. I can also have standard contract. These are all my other options here, but it will automatically apply the contract that it's supposed to based on where you're doing work.

14073176197

59:58 Now, we have to go with certain customers and we have to change the rates because it only gives us one price book.

14073176197

1:00:09 To... for us, we do a lot of work for the city of Orlando here... discount of course, because of that... but unfortunately, we have to go in and manually a pack of outside source of what we charge though. So when she goes in to do billing, we're costly having to change numbers all the time for a few different selected customers because we can, we don't have that capability of given.

--- Quote templates ---

JOSEPH

1:00:44 Yeah. And if you accidentally send them two prices for the same thing, they're probably gonna ask you what's up with that.

14073176197

1:00:51 Right. And that happens sometimes.

JOSEPH

1:00:56 So as you can see here, if you watch, the unit price over here.

14073176197

1:01:01 Yeah. I saw that they change automatically when you pick it up, pick it up.

--- ST app contracts and pricing ---

JOSEPH

1:01:05 That's exactly right. And then if I change the price here and say, let's make that 100, that will flag that and say, hey, contract price is 84 dollars based on the markup rules you've set in the background.

14073176197

1:01:18 Okay. And that background, again, when we did that, I sorry, I might have not caught that, but when you do that in the beginning, so those are set up for your customers and not for, the price list?

JOSEPH

1:01:32 Yes, that's exactly right. So you have a standard cost in service trade and then per location or per customer or you can group customers together and say, hey, these are our gold silver bronze level PM levels. They get these mark up rules. So I can have a pricing contract apply to 100 locations or a single location or five locations. And you can determine, hey, we need 50 percent markup on parts between that cost between a dollar and 50 dollars. And if the parts cost over 50 dollars, we only wanna market up 20 percent, and then all labor is marked up 35 percent.

14073176197

1:02:23 They're a loan, it saves time.

JOSEPH

1:02:26 That's exactly right. And actually a little tangent here, let me go to my service contracts. If I got one for. So when you start apply or invoicing things out underneath that contract. So when I set it up, I can set those item prices, I can set the contract rules with payment terms and mark ups and things like that. And then it'll understand how many invoices have been sent out underneath this contract. So I have 18 sent out under this one and it'll start to calculate my expected margin versus my actual margin as I go. So when it comes time to renew this PM contract, your salesmen can quickly see, wow, we made money on this one.

--- Quote templates ---

JOSEPH

1:03:13 Let's renew it as is keep it simple or, wow, we didn't hit the mark we were expecting to, we need to raise our prices.

14073176197

1:03:25 Okay. Yeah, that's nice.

JOSEPH

1:03:29 Right. So, I'm gonna select a light item type with detail or let's see. Now, let's just do summarize by line item type that's where you determine how you want the pricing displayed for the customer when you're sending a quote.

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

JOSEPH

1:03:45 And then when I want to send the quote, I can just click send to customer. I can toggle pictures and videos on or off as I see fit. And then I can select your contact and send it.

14073176197

1:03:57 It's gonna say, is there a way that we could do those templates on those quotes per like the vision?

--- Quote templates ---

JOSEPH

1:04:07 Yes, ma'am.

14073176197

1:04:08 They may where they can be customer because like the service department wouldn't use the same quote as, so our PM guy would.

JOSEPH

1:04:18 That's exactly, right? So you can you the all those templates or whatever you want them to be?

14073176197

1:04:25 Okay.

JOSEPH

1:04:27 We'll just help you set them up.

14073176197

1:04:29 Template, he could design a template for his quote?

JOSEPH

1:04:33 That's right? So he would go in and click apply template, and then you'd probably just have some sort of naming convention so that it would be service dash, compressor replacement, something like that.

14073176197

1:04:44 Right. Okay. Bye.

JOSEPH

1:04:47 So, what did that? How do you feel like that process was?

--- *Paper process* ---

14073176197

1:04:50 Right now is not user friendly. What we're using now is not user friendly to do that with.

JOSEPH

1:04:56 The...

14073176197

1:04:57 Formatting. And the way you do that, I'm pretty good at designing grades of forms and that is a pain in the butt.

JOSEPH

1:05:04 So, how did this, how did this quoting process compare with the amount of clicks and how simple it was?

--- *Quoting* ---

14073176197

1:05:13 A lot less... everything's right there... other than having to go and look for certain things. So, yeah all your action buttons like.

JOSEPH

1:05:27 Try and keep it simple.

14073176197

1:05:31 Thank you for calling from mechanical.

14073176197

1:05:38 That's...

JOSEPH

1:05:38 Pretty cool. So, we'll also keep up. Looks like you viewed the quote. You got the e-mail...

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

14073176197

1:05:47 Hi... it tells you when you get it... customer that read it.

JOSEPH

1:05:57 That's right? So, if you don't mind clicking approve on that quote for me, I'll show you how it comes back to the office.

14073176197

1:06:05 Where does that? The e-mail...

JOSEPH

1:06:08 Yes, ma'am, so, when, you opened up the quote, there should be an approve or request changes button at the top, right?

JOSEPH

1:06:23 So, you got the e-mail you click view and respond to quote, and then that'll open up the quote where you can see, the options to approve or request changes.

14073176197

1:06:42 For some reason, I can't get out.

JOSEPH

1:06:48 You might have to check the terms and conditions box, that may be what's limiting you from clicking the approved button.

14073176197

1:06:54 I can't even get into my e-mail right now.

BRIAN

1:06:57 Hello?

BRIAN

1:07:18 You...

14073176197

1:07:18 Are okay?

14073176197

1:07:24 And you go in and you click the detail?

JOSEPH

1:07:35 Approve or request an, is that really super nice? Then you'll check that terms and conditions box and click approve.

14073176197

1:07:46 I see the terms and conditions, but it doesn't give me a box.

JOSEPH

1:07:50 On the left hand side, let me see if I can pull up an example for you.

14073176197

1:07:55 I don't see a box there.

JOSEPH

1:08:01 Have you clicked the button?

14073176197

1:08:06 You gotta hit that first.

JOSEPH

1:08:09 Yes, ma'am, so, the terms and conditions are on the quote itself. And then when you click approve, it has the box to check.

14073176197

1:08:15 I see now, okay. Is, is that then it comes back in it, Sam?

--- Quoting ---

JOSEPH

1:08:21 That's right? So you should get an e-mail you should get an e-mail saying, thank you for approving the quote. I'll get an e-mail saying, hey, this has been approved and I can either create a new job from the quote or I can add it to an existing job. So I can just select that, select an open job at that location and it'll add it to that same job or work order that's already out there.

JOSEPH

1:08:47 And I have a full history of when it was viewed when it was approved, the po that the customer gave us and the IP address that it came from. So when it comes to following up on quotes, this can be super useful because I can go to my quote reporting page and one, I can use this to see, hey, what quotes had been approved if I didn't look at it through the e-mail but since we're tracking those views, I can also go in and say, hey, show me all the quotes that have been sent to the customer and viewed by the customer that have not been approved that expire at the end of this month. These probably were opened looked at and then potentially forgotten about. And so I can go back in, select all of them and then click send to customer. And so that will resend them to the customer and drop it back at the top of their inbox, ready to be approved, it's a great way to follow up quickly.

14073176197

1:09:44 That's nice.

JOSEPH

1:09:46 And you can set reminder, you can set them to automatically resend every week.

14073176197

1:09:52 That's something else that's going on too because we are, you know, and everybody is more human, but we're super busy, but sometimes we can take that moment, you know, to go in and look and just like these guys, you know, even our PM guys, you know, doing their quote as well. I mean, that tool is, very handy.

--- Quoting ends ---

JOSEPH

1:10:11 Glad to hear it.

14073176197

1:10:12 No, are getting missed.

JOSEPH

1:10:16 You say quotes are getting missed right now?

14073176197

1:10:19 I said, so they wouldn't be missed. I mean, I'm not saying that they are, but.

JOSEPH

1:10:24 Follow-up...

14073176197

1:10:25 I like, that you have a list right there in front of you because right now we're using several different things.

--- Accounting integrations ---

14073176197

1:10:31 We're you know, we use the program we use word, we use, you know, excel, we're using stuff is scattered everywhere.

JOSEPH

1:10:40 Yeah.

14073176197

1:10:42 Everyone has access to quotes or has access to individual computer files. You know, things of that nature. We do share drive that we keep a lot of that stuff on two. But if we can narrow down some of our programs and be able to utilize one program would be awesome.

--- Quoting ---

JOSEPH

1:11:04 The more central all that data can be, the less likely it is that things slip through the cracks because I can, I could follow up on everybody's quotes by selecting all and re sending them rather than bugging a salesman to go and follow up on his quotes. And as you probably know, with sales people trying to get them to do anything they don't wanna do is pretty difficult.

--- Quoting ends ---

14073176197

1:11:30 Right... right.

JOSEPH

1:11:34 Well, Tina, what are your thoughts on service trade though? I mean we've just, we're just scratching the surface on it. But at this point, what do you think?

14073176197

1:11:43 I really like the program... very user friendly. I don't I think anybody would be able to pick up, you know, if you know how to fill in a box and be able to use it. That's a big help.

JOSEPH

1:11:59 That's great to hear.

14073176197

1:12:01 No. In the transaction of the way it flows now, my mind is just going everywhere because now I'm trying to go from a to Z. You know what I mean? And that's what I do. I'm an analyst. I like to analyze everything. So, and now I'm trying to see a to Z picture of it, the whole process of it. And to me, I think it's a little bit more user friendly than what we've got going on. Definitely. So the formatting and design is a lot better.

JOSEPH

1:12:31 Yeah, we have a lot of experience on that. So this is a slide I didn't touch on at the beginning but I think it's really important to talk about. We've been in business now for over 10 years, almost 11 years. We have over. Actually now it's 1,300 active accounts, not people that are still in onboarding or anything like that, but 1,300 active accounts. And we only work with commercial and industrial fire and mechanical contractors. Our business is about 50 50 on fire versus mechanical. But the workflows are very similar. And over 10 percent of build commercial and industrial buildings in the us have been serviced by a service trade contractor. So, we're not testing our software on you. It, it's been proven.

14073176197

1:13:25 That's right.

--- Implementation and ongoing support ---

JOSEPH

1:13:26 But what you were talking about earlier with wanted to go through all the nitty gritty details that's really what I would wanna do with you all in person, Zoom meetings are great, to get a taste of these things. But it'd be a whole lot more effective to just set aside two or three hours with you and Justin and walkthrough the entire system start to finish and all the nitty gritty processes that you'll want to think through.

--- Implementation and ongoing support ends ---

14073176197

1:13:51 Right.

14073176197

1:13:56 Then of course, at the end of the day and, you know, what it's all about. We need to know, you know, costing.

JOSEPH

1:14:03 Yep. Well, it all depends on all, the nitty gritty details I mean, with some of the stuff you service trade, we don't just throw out one price for everybody. It all depends on what you need. Hey, what do you need with your inspection forms? What do you need with your inventory management capabilities? What sort of capabilities within service trade? Do you really need? We try and give you everything that you need. Nothing that you don't really.

14073176197

1:14:31 Okay. So you can build a package?

14073176197

1:14:37 Right.

JOSEPH

1:14:38 Yes, ma'am, that's exactly what I'm trying to say that's a better way to say it. I'm gonna start using that we build a package based on your needs. So, do you think it'd be worthwhile to catch up with Justin and schedule a time for me to come down there in the next three or next month or so?

14073176197

1:15:00 Yeah. Let me see. This is September, October, November. You know, it's hunting season. It's a little bit of everything going on right now. So.

JOSEPH

1:15:08 I was down at the farm yesterday, I was looking for.

14073176197

1:15:12 Yeah. Now, it's time to clean the camp, you know, the camps up and all that kind of thing now. So... I would have to find out when I could get him set aside.

JOSEPH

1:15:24 In season start for you.

14073176197

1:15:27 Sorry, what?

JOSEPH

1:15:28 When does hunting season start down there?

14073176197

1:15:32 We start after, I wanna say around the artery, I think starts right before thanksgiving.

JOSEPH

1:15:41 So, yeller behind us, archery just started for us and then gun season first.

14073176197

1:15:47 I wanna say we're like too much behind most people but.

JOSEPH

1:15:53 Well, I mean, if we can do something beginning of October, I can get down there before our hunting season starts and really determine if this is going to be a good fit.

14073176197

1:16:04 Where are you guys at? Anyway? Where are you stationed at?

JOSEPH

1:16:07 We're both out rally, North Carolina. That's where our office is headquartered. But then we have folks all over the country.

14073176197

1:16:13 Okay. Nice. That's right? That's that's right? I forgot that until Brian had told me that they would be on the same page or?

JOSEPH

1:16:25 Yeah, it's funny. We're both, we're both in Raleigh, but neither one of us is in the office today.

14073176197

1:16:30 Really sound nice.

JOSEPH

1:16:36 So, what be the best way for me to follow up with you? Do you wanna, do you want me to send a couple of dates over for you to pass on to Justin or do you want to just catch up with him? And then I can call you next week and beginning of next week and we can figure something out.

14073176197

1:16:52 Yeah. Do that and give me some time. Give me a couple of days because I don't think he'll be here probably the next few days, but... just said he might be in the office twice a week.

JOSEPH

1:17:05 Okay. Well, I will put together...

BRIAN

1:17:08 To figure out what it is.

--- Purchase decision ---

JOSEPH

1:17:10 I'll put together a recap e-mail that kinda has a lot of, the things that we talked about. Some of the case studies we've done on current customers on how service trade as help speed up their billing and simplify a lot of those workflows. So, I'll make sure to include that so that you kinda have some ammo when you go to Justin to say, hey, this is why these folks, are good at what they do.

--- Purchase decision ends ---

JOSEPH

1:17:34 And here's the stuff to prove it. And then I'll give you a shout in the next week and we can get something hopefully scheduled for beginning of October.

14073176197

1:17:46 Hopefully we can let's make a deal.

JOSEPH

1:17:48 Awesome. Well, I really appreciate your time. Thanks for running a little bit long with us and look forward to catching up soon.

14073176197

1:17:56 To appreciate both of you all. Thank you so much.

JOSEPH

1:17:59 Yes, man. You have a great day. Thanks you.

14073176197

1:18:01 Okay, you too.

JOSEPH

1:18:05 Bye.

The End