



ServiceTrade Project Management Demo with Christiana Mechanical Inc

Brett Griffith with Christiana Mechanical Inc
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Participants

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13023738099

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Transcript

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

BEN

0:00 Hello? Brett?

BRETT

0:01 Good afternoon. Good afternoon. Are you running this instead?

BEN

0:05 Though, no, she is, I'm just jumping into. We're both kind of I'm kind of learning are getting up to speed on the project management. It's kind have a learn as you go. Yeah. So, so I was just jumping in just to, you know, we were doing some practice demos together. So she's going to do this one apple pie tag team back and forth until we both get pretty good at it. Okay?

BRETT

0:29 Yeah. No, that's pretty much the whole reason that I wanted to download around this as well because I'm also learning... and so hopefully I'll be able to do it from here on out. After a couple of more about you guys that being said, it was Ozella said she's running a little bit late. Let's just double check. She's come in. So I got the prospect in the waiting room. So I'm gonna let them in and talk to them for a minute.

BRETT

1:11 Hey, good afternoon, Jessica. Can you hear me? Yes. Awesome. How you doing?

13023738099

1:17 Good. Glad to hear it.

OZELLA

1:20 Hello?

BRETT

1:23 Hello. Alright. Hey, Ozella. We're all just getting situated here. Let me go ahead and turn my camera on for you guys. Alright? So, Jessica, Becca, thank you both for joining us today. I know it's kind of your first time meeting me weird situation where you did the first demo with Billy, I'm gonna jump in and take it from here. But for today's meeting, we brought it was Della moment on the phone. She's our solutions architect that's going to be able to show you the project management features that service trade has to offer.

--- Type of work ---

BRETT

1:54 And I know for Christiana mechanical, that's pretty much majority of your guys business, project management, right? Yeah. Okay. And just to catch me up to speed, Jessica, sounds like you're hired because you had experience with project management and so maybe you were hired to grow and expand on it.

--- Type of work ends ---

13023738099

2:14 Yeah, and to get us into a software that you get us also pen and paper.

BRETT

2:19 Yep. Okay. That's definitely something we can do for you. So actually listen to the recording of your initial call with Bailey. And basically what I found from that recording was you guys are essentially just looking to have everything in one central location whether it's change orders, budgets, drawings, XYZ, whatever it is that pretty accurate.

--- Purchase decision ---

BRETT

2:40 Yeah. Okay. I know you're also evaluating BuildOps for project management. Are there certain things that you saw with them that you really like maybe that you didn't like, I know you're just a little deeper in that process with them?

13023738099

2:55 I mean, we've like pretty much a lot that they have to offer. We're just kind of comparing the two programs right now. So we want to see what you guys have for your full package.

BRETT

3:09 Yeah, absolutely. And then, is there any sort of timeline that you guys are looking at in order to get software in place?

13023738099

3:16 I don't think we're going to be doing anything before the first.

--- Purchase decision ends ---

BRETT

3:20 The year. Okay. No worries. That's why we're here today. Sorry, headset that's something there, but that's why we're here today to show you what we have to offer. So that being said, though I'll let you take it away from here.

OZELLA

3:38 Anything? Thanks, Brett. So I'll just walkthrough the life cycle of a product and service trade and walk you through some of the features that it comes with. And if there's any questions along the way or anything that you want to see, just let me know and then go ahead and screen.

BEN

3:54 Share.

OZELLA

4:01 Alright. And we are looking at service.

BEN

4:05 Yeah.

OZELLA

4:06 Okay. Let me try to get rid of some of the white space. There we go. There's something kind of weird about having a little too much it space but it keeps coming alright. We'll work around it. So what we're looking at here is a submitted quote in service trade. So this is the starting point for everything in your world. You may call that a bit.

--- Quote templates ---

OZELLA

4:30 But this is the initial quote that you're going to submit. And I've used service trade service template to add some services or phases to this quote and a quote template to add my description. I've got all the items here that are going to be associated with each phase.

--- ST app contracts and pricing ---

OZELLA

4:47 And this is what we're going to refer to as service granularity which is going to allow you to see on a per service basis. What attachments comments or items are going to go with it. So I can see at each level, what's going to be included in this particular deliverable for the customer and they'll be able to see that as well.

--- Quoting ---

OZELLA

5:08 And then I also have that same grouping down here. With each item. I have an attachment here. It might be a diagram or drawing or something of that nature that I'll include right along with the quote. Then I can go ahead and send this to my customer. When I send it, this is how it's going to show up in the inbox and you will know when the customer has looked at it or opened it, I can make decisions about

expiry date and things like that. The customer is gonna open it and be able to click approve. And this is what they're gonna see and you'll have this kind of finalized PDF. You can see who received it if they included a po number and the date that they approved, it wants to quote is approved, then you can create a job really quickly and it's just a couple of clicks.

--- ST app contracts and pricing ---

OZELLA

6:00 And once you create that job and service trade, you can make decisions about whether or not you want to manage that job with a budget. So you'll be able to toggle that on and save it. Once that job is created. This is what it will look like in service trade.

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

OZELLA

6:15 So it's pulling over all the details from that well, any comments and attachments are gonna come over and it's going to go ahead and create a budget for you can go in and make sure that you have each of your fees is scheduled across, however many appointments that are needed. And again, all of those details that we had in our quote have come over including the items that are going to be needed for each. Of those deliverables... now, I'll pause on this page for a minute and we'll go through some of what we have set up. You can see that I have some clock events setup and, you know, just to kind of have mock out the process of starting some of the work.

--- Assets ---

OZELLA

6:58 We have the asset that's going to be associated. There's some comments. And then the same attachment this port over as well. Another feature that is really helpful about service trade is that you're able to filter a job. Now on this view, if this job is taking place over a number of days or weeks or months and I want to see what is happening yesterday.

--- Assets ends ---

OZELLA

7:26 For example, I can filter this job and only see for example that these two o'clock event occurred on that day. I could also filter for this month or next month for example, and see what is going to be happening next month for this job? If anything... I can also see what happened last month or last week, if anything.

--- ST app contracts and pricing ---

OZELLA

7:55 So those are some additional filters that you can apply. So in this place is more o'clock events that I would be able to see... now moving onto the actual budget.

When you're setting up that budget, you'll have an option to choose a high level budget or granular budget. I'm going with the granular budget for what we have selected. So you'll be able to just click it and then it'll create the budget from the existing job items, which means it's just gonna pull everything over. And this is the budget that I have set. Right now. My budget is in a draft status, so I can still make some changes here. I can do some editing. I can move things around.

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

OZELLA

8:43 And when I'm in the edit view, this is what it looks like. I can add items directly within a section that are going to reflect back on the job. So for example, here, if I decided that I'm actually gonna need some additional material, I can do that.

OZELLA

9:06 And...

BECCA

9:06 Then we'll a po, get assigned to the new material you are putting in here.

OZELLA

9:11 So, interesting question. When you say will appeal, get assigned? Are you referring to for example a parts order?

BECCA

9:19 I see you're just creating a budget with us. Okay? Now?

OZELLA

9:22 That's right? Yeah. I'm still just not a budget. So I need a po, I could do that and partsledger that would be a different place.

BRETT

9:28 Okay.

OZELLA

9:30 But, but for the sake of, you know, for example, just adding another item because I want you to see kind of what that looks like. I can say that this will be 500 dollars for example. And then when I save... I can come back over to my job and I might need to refresh it and let me remove my filter.

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

OZELLA

9:52 So we know we're still in filter because everything is the blue, it's all Bright blue like that. So once I remove the filter, there we go. And.

OZELLA

10:04 So then anything that I've added to my budget will then also be reflected on the job. So you don't have to worry necessarily about, you know, the double entry or missing an item, but that you added the budget, it's going to show up here as well. Alright. So from this view, once I'm satisfied with my budget, right? I can see all of my items, I've got a good view of the distribution of my cost. I can see my original budget. And then if I have any change orders that occur, they'll reflect that change order totals. And then that would result in a revised budget. So the change order goes up or down that'll change my ending number there. I can turn on and lock my budget once I'm satisfied with it. And that way, there's no further changes that will happen here. Any changes that do happen, I can see within the budget history, I think.

BRETT

11:04 Right.

OZELLA

11:05 Correct. Correct. There are permissions for viewing budgets, permissions for managing budgets and permissions for administering budgets. We can manage multiple budgets across the, or... now some of the feature. So, for example, what's in Progress right now? And by the time you all the live, you'll be able to actually see the change order button here. So right now, you can see the budget is locked in. Once I do that, there would typically be a button that would show up. So I'll come over to my supplement... so that we can see that. And it'll be a button that allows you to create a change order. So once you do that, you'll be able too, you know, do an internal or an external change order, internal change orders being those that are only going to impact your cost. Maybe you're changing out the technician or something like that or the type of technician, but it does necessarily impact the revenue or the positive customer.

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

OZELLA

12:06 Another simplified way to think about that might be whether or not it's something that needs to customer approval. Your external change orders are going to be the ones that require customer approval. Something that you'll have to send out. They're going to I'll, take the format of the same view. It's going to be a very similar look to it. When you hit that, send the customer button, you have this interface and this is the same for when we're doing our invoices and it'll be the same for when you're sending a change order, pardon me, it'll have the same look and feel where you'll select who's getting it.

--- Quoting ---

OZELLA

12:41 You'll make a decision about what type of information they're going to get, you know, and whether or not it's an internal or an external change. Where... you'll also be able to see the history of that change order in the status of it, what's out, what's been approved, what's been cancelled?

--- ST app contracts and pricing ---

OZELLA

13:06 Alright. Any questions about that so far? We're about the process, how it works or the features that are included?

13023738099

13:15 So you were just showing a bid, correct? Not an actual book job.

OZELLA

13:22 Hi, this is a booked job. Yep, this is a job. It is in, it's in Progress and it has scheduled agents phases.

--- Quoting ---

OZELLA

13:28 Pardon me. Now, we do have the quote here for the bid that is not actually schedule if it hasn't been approved yet, right? It's just been submitted status. This is what that would look like. Very, it looks very similar.

13023738099

13:43 I'm looking at that and I, I'm trying to see if I can see actual calls, first estimated calls in one place.

--- ST app contracts and pricing ---

OZELLA

13:52 Yep. So this is this quote. This is your estimate. And then in...

BECCA

13:59 Yeah.

OZELLA

14:02 So it has that estimated price here and that comes up based on the quote. Yep.

13023738099

14:09 Well, I'd be able to see by phase what the cost is currently on each phase... like... if they see labor, what the current hours are versus the estimated hours.

OZELLA

14:25 So, when you actually start to incur the cost, yes. So when you actually start to incur those costs... you're working Progress, it's gonna look like this. So you'll be able to see total incurred. And this is all right on the job. So you'll be able to total

incurred. You'll be able to see the material labor an hour's breakdown and you'll see it in hours and dollars, you'll be.

13023738099

14:54 Hi... there... I'm sorry. Does that break down even farther like per phase like equipment, material, plumbing, material... sub contractors, what the actual cost is? First? The estimate a call?

OZELLA

15:14 Right, right.

13023738099

15:16 Yeah. I didn't want, I mean, that's nice that it, there is like a summary view, but I didn't know if there was like a detailed view.

OZELLA

15:25 Yes, there is. And give me one second because I, probably all I would need to do is actually just on lock that one. Let's.

OZELLA

15:38 See here, I have some of those slides not revealed, but yes, we do have that view.

13023738099

15:45 Okay.

OZELLA

15:46 Yeah. So you'd be able to see this is all in the one page. So you would be able to see for him, right on the job, you can see a summary of your costs and your revenue, but then see the detailed view of, okay, this is the service. These are the parts. This is my original budget. This is the change or against that particular item, the revised budget. This is exactly what you're looking for there, right?

13023738099

16:11 Yeah.

OZELLA

16:12 Yeah. Yeah. You can see what was quoted against what was invoiced absolutely.

13023738099

16:19 Okay.

OZELLA

16:20 Yep. Any other questions?

16:28 Not right now, no?

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

OZELLA

16:32 Yeah, Brett, I will turn it back over to you then.

BRETT

16:37 Yeah. So Jessica, that was really what we wanted to show you as far as project management since I know that's important to you. All, I know Ozella just asked any questions, but is there any other features or things maybe we didn't show that you guys need?

13023738099

16:52 You able to run reports on... different jobs? Like I call it a contract status report to where I can see all of our open jobs. And if we're over or under on our call, what we build anything like that?

OZELLA

17:14 So what is up and coming? It's not, it's right now. We're just want to have this view on a per job basis. And I'm wanna make sure that I'm answering your question and probably, but I think what it feels like you're asking for is the ability to see what I was just showing you here. Hold on one second.

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

OZELLA

17:32 Let me just pull that window right back at. It feels like you want to see this but on basically see it for the whole based on all of your jobs, what's my total incurred total invoiced material, be able to kind of filter across your whole organization.

13023738099

17:51 Yeah. I would like, I mean, I personally like to be able to break it down by project manager with all of their jobs listed all in one report with the actual versus, yes, medicals. So I can see if they're over under on their billing.

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

OZELLA

18:09 Yeah.

13023738099

18:10 Every in place. You know what I mean?

OZELLA

18:14 Yep. Yep. No, that actually, that all makes sense. And I know that is something that has been discussed and I think it's actually being worked on, actually do this at the whole org level. I meant to be able to filter by service type by job type and different things like that. So you're it's not far off at all. I can't be too far into roadmap things, but I can't say that, I know that it's not far off in terms of what we'll be able to offer right within service trade. There other tools that we offer that you might be able to pull that information, but I wouldn't want to necessarily send you down that time to pass it's something that will eventually be available right within the product.

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

13023738099

19:04 Another question, the job numbers or are they customizable?

OZELLA

19:10 No... what we do, I'd be interested to know what you'd want to customize them to or what you're thinking about in that regard.

13023738099

19:20 We differentiate our jobs between contract job, the jobs and ton of material. Joe. So we like code them different with the job numbers.

OZELLA

19:34 So, and I heard one of the types, I heard you say contract jobs?

13023738099

19:41 Or like that would be our AI, which brings me to another question. Do you have like an AI billing feature in here?

OZELLA

19:49 We do not, we do not. And yeah, and when I was active listening to the previous recording, I heard mentioned of GC forums and I was like, I wonder if they're going to be doing any AI billing and it sounds like for sure.

--- *Type of work* ---

OZELLA

20:03 Yeah, what support that today? I mean, typically jobs that require that are much larger in scale and complexity. And so we have like pro for that might be better suited to that. But for your service type of projects you're installs retro fit, that sort of thing. Typically jobs that are going to be under a year.

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

OZELLA

20:28 We're really good for that. And so we have a lot of customers that are happy with the Progress of the project management see in that direction, if that feels like, you know, kind of more your wheelhouse or if you're gonna be dealing with the bigger things that it might be a little bit of a different tool that you need for that part of it, the business Brett?

--- *Paper process* ---

13023738099

20:48 Yeah.

BRETT

20:48 Yeah, Jessica, where are you guys doing your billing today?

13023738099

20:53 What do you mean? Where we do it right right here on pen and paper? Okay?

BRETT

20:59 Yeah.

OZELLA

21:02 So, you could continue, will not continue to do it and pen and paper, but you could potentially handle that portion of it right separately.

--- *Deficiencies* ---

OZELLA

21:12 And if there is some kind of, you know, some type of an artifact that you need to upload to the job just for record keeping, say, for example, you could do that and you can add those attachments, right? We don't limit you on the attachments that you can add.

--- *Type of work* ---

13023738099

21:28 Okay. Yeah. When you had asked about BuildOps, they do, they offer the AI billing right into the program, like everything's done right there, that's why?

BRETT

21:46 Yeah. So two of those point there that's not something we currently have, and I don't think that's something we're working towards either because yeah, we do really focus on those smaller special projects. The ones that do, you know, typically end up last thing less than six months or maybe less than a year depending what kinds of project it is.

22:05 Yeah, but.

BRETT

22:06 That's what we're working with today. Is it crucial for you guys to find a program that handles AI?

13023738099

22:16 I don't know that it's 100 percent crucial, but it would be nice to have some place.

--- Accounting integrations ---

BRETT

22:25 And what do you guys use those accounting system today? Which version?

BRETT

22:36 So, do you have any experience with Quickbooks desktop as far as if it does that?

OZELLA

22:41 If it does, what project management?

BRETT

22:43 Hey, billing just.

OZELLA

22:46 No, I don't have experience, but that would pick books but also, it's my understanding that it doesn't... yeah.

--- Purchase decision ---

BRETT

23:00 So, yeah, that, that's kinda the one thing we need to talk about. I guess we need to, maybe you guys need to talk to Jeff internally about as far as, hey, is this crucial? Do we 100 per cent need this? Because if we need it, I hate to say it, but I think I don't think service trade the best direction... but if it's not something that's 100 percent required of what you've seen Jessica, what are your thoughts about service trade project manager?

--- Accounting ---

13023738099

23:28 I mean, I do have a little bit of an issue with the job number is not being able too... customize those. And I don't like not being able to see a report of all the jobs together.

13023738099

23:48 There are the two things that stand out to me right now.

OZELLA

23:55 Say two things when it comes to the job number, I think when we have customers that, you know, prospects or customers that join us and they have a concern around the job number coating. It sounds like from what you mentioned, that typically just has to do with understanding what type of work it was and who was involved in it, that would be, or when it happened, they might have something like zero one for Installation or inspection. Dash S, the dash 22. So something to acknowledge the year and the job type in the rep, you know, that kind of thing. But in this situation, because we offer job types, right? Like you can see the job type, we offer filtering on job types and you filter by job, you're filtering by salesperson rep, you have all of those components, right?

--- Dispatch ---

OZELLA

24:53 Baked in within service trade that follow the job all the way through. So having a job number, does it become necessary?

13023738099

25:03 Okay.

OZELLA

25:04 Yeah. So for example, we do have this jobs view that I could come to here. We'll do that here. So if you were to come to this jobs view, you can see a lot of information about all of the jobs. For example, jobs that have, you know, all of your appointments, complete, any jobs that are unscheduled and need to be any jobs with services complete, but incomplete appointments, parts that needs to be ordered, all parts received, but the jobs not done things like that. And then you can do searches based on it based on the subcontractor vendor.

--- Accounting ---

OZELLA

25:38 And then we talked about job type... what type of job is it? Then you can kind of have, you know, whittle it down from there. So, so we provide you with a number of different mechanisms for filtering and that gives you a lot more flexibility at the end of the day because then you have you're able to kind of move your variables around versus having just the fix number.

--- Accounting ends ---

OZELLA

26:00 And a lot of customers really appreciate that. Once they get accustomed to it. It's like, well, you know, what I've been doing, these fix job codes when now you can actually run a lot more reports because you can play with your variables and you're not stuck to just the number. Does that make sense?

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

13023738099

26:18 Yeah.

OZELLA

26:19 Yeah.

13023738099

26:20 How your purchase orders work? And the guys pull their own purchase orders from their phones or?

OZELLA

26:32 So, Brett, how would we like to handle that? Because we have different ways that you can manage that, and I'd love to know whether or not we're gonna open the partsledger bucket or if we want to go with the native?

BRETT

26:45 Yes. So let's start with Jessica. How are we doing that today?

13023738099

26:52 They're calling into the office and we are giving them purchase orders pulled off of the spreadsheet.

BRETT

27:01 Okay. Are you looking to get away from using the spreadsheet for POS?

13023738099

27:08 Yeah, we would love for them to be able to pull their own purchase orders from their phones and it go directly into the system especially when they're on off call, when they're on call, weekends, off hours... and they could just do it themselves.

--- *Invoicing* ---

BRETT

27:28 Okay. I mean, real realistically Ozella here in that one, I think that does open up the partsledger conversation.

OZELLA

27:37 Yeah, I think the easy answer. The real easy answer is this is your job, it's set up and you're using Quickbooks. Desktop. We have a native integration with Quickbooks. As soon as this job opens, I'm going to send this job to Quickbooks.

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

OZELLA

27:55 And so now the technician is gonna use the job number again, it's a unique number and that is the po reference number. So, if they need to have a po number that's what they're gonna use it, they don't necessarily have to call you for the number because they're gonna use this and the job has already been sent to Quickbooks. So, you know...

13023738099

28:16 Same number for all the purchase orders.

OZELLA

28:21 Or this job... that's one way that's one way, the other way is as we were discussing partsledger, now, I can absolutely show you that. I think actually we're really good on time because we had a full hour, but... yeah. Okay. I see Brett notting. So I just wanted to make sure before I went down that path.

BRETT

28:47 Yeah, no, I think it's best to show them kind of what we have as far as that.

OZELLA

28:52 Absolutely. Let me pull up.

13023738099

28:55 Yeah, I want them using the same purchase order number for different vendors. That just wouldn't...

OZELLA

29:02 Yep. Absolutely. I hear you. So I'm gonna pull open... mobile app. Just give me a moment. Let me do it, right? Yeah.

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

BEN

29:22 Resume...

BRETT

29:35 Should I be looking out for a new device joined?

OZELLA

29:37 In a minute for me type it all.

BRETT

29:41 Cool.

BEN

29:49 Yeah.

OZELLA

29:54 I guess that's done and fancy things I need to switch my... but I'm in a different demo rate from what I'm on and not.

BECCA

30:08 See right now?

OZELLA

30:11 I can just slot that's not a huge deal.

BEN

30:18 Yeah.

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

BRETT

30:29 And bio's of getting set up, Jessica, are you guys also keeping inventory... or is it only buying as needed?

13023738099

30:41 Becca, we don't really keep a full inventory doing?

BECCA

30:45 No, we buy as needed. Yeah.

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

BECCA

30:57 Yeah.

OZELLA

31:00 Well, do you gotta find my?

BEN

31:03 Hello, right there, we're exploring... or?

--- *Type of work* ---

BRETT

31:24 And also, one other thing just to clarify know, barely talk to you, Jessica about it. Sounds like you guys have five technicians dedicated towards commercial service and then you got 20 guys dedicated towards projects? Is that correct? Yes?

13023738099

31:37 Roughly about that?

BRETT

31:39 Yeah. And then you're looking for a software for both service and project management, right?

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

13023738099

31:47 Yeah.

OZELLA

31:53 All right. So, I'm thinking very off patients.

BEN

32:00 Right. Yeah.

BEN

32:12 Right... now?

OZELLA

32:18 Over to you. Okay? So I'm on a job. This is a different one from the one that we were looking at before. So I was just in a different demo account but it'll be the same kind of situation or workflow regardless. So I'm here, I'm logged into my job and I can review job items, right?

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

OZELLA

32:43 And I can make, I can look at them and see, you know, where they sourced and all that sort of thing. These items might have been, you know, from that same list that came over of items that were required for the service, but they don't necessarily have a source.

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

OZELLA

32:56 I might need to get them from a vendor, right? So now I can make those decisions if I don't have for example a motor, right? And electric motor sitting in one chunk and then they go get one. I've got a couple of options from how I might go about that. I might do the purchase while I'm out in the field and I can go ahead and say, okay, I'm going to run the lows and I'm going to get it and then I can source it... using partsledger. I can create a po draft for that field purchase. And do you guys typically just turning receipts that sort of thing?

13023738099

33:41 Yeah. Sometimes that's the problem we're trying to get away from paper.

OZELLA

33:48 Absolutely. Absolutely. So in this situation, I'll point out that I've already been logged in to partsledger service trade. I only have to do that once. So you don't have to re, log in and everything's you can see, I didn't have to punch in my job number as soon as that clocked into my job on service trade, it's going to go ahead and populate the job number here in partsledger for me, the way that the systems are connected.

--- Parts management (inventory) ---

OZELLA

34:12 So I can do multiple things. You mentioned, you don't do a lot of stock on hand. So the stock look up might not be as relevant. I do also have the ability to transfer stock. But again, if you're not keeping our stock on hand, not as relevant, I can make a decision about my supplier.

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

OZELLA

34:29 So in this case, let's say if it was lows and I want to proceed. Yeah. And so you see there I've got my supplier making, I've got my job information and all of that is setup and I can say field purchase or job. I can add item.

OZELLA

35:00 And as soon as I start typing, you can see it's really smart and it's gonna go ahead and pull it up for me. Let's say one and items, yeah.

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

OZELLA

35:15 And once it's set and I'm gonna wait for the lag between my device in Zoom so we can catch up.

OZELLA

35:25 Once it has gone through that process, then I'll have an option to attach a photo. And at that point, I'm going to include a picture. Maybe if I go off and it'll help with my bandwidth. I mean, there... there we go.

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

OZELLA

35:48 There we go. So you can see we have PO1 eleven, and then I can take a photo of my with seat.

OZELLA

36:08 And then I can just hit done. And so what I've done there is I just sent it back to the office, right? That I did that field purchase and what it was for and where it was from... on the mobile app. What I would just want to do is say the reference number, for example, assuming that they're just doing reimbursements, they're not using a company card or anything like that, right? So on that, go ahead.

13023738099

36:43 Most of it's purchase own account, do vendor.

OZELLA

36:48 It's purchased on an account.

13023738099

36:50 And then we get invoiced.

BECCA

36:53 Okay, great.

OZELLA

36:54 Yep. And so that, I mean, that's that works out just as well. That's great. So then all they would need to do is so you can see it's here and they would just come in, it's been ordered and it's got the po number. Everything is there... the details are here. And then when they use it, they can say when they used it, but... we'll see.

13023738099

37:19 Right away as far as calls.

OZELLA

37:21 And they say which item. So now it's on the job. So they added that now this is an order status and it's on the job... that's happened. Yeah. So this is here. So now back over in parts ledger from office view what you'd wanna do, give me one second because there's one more thing the technician wants to do here is also attach this

directly to it. I mean, you have to you, it's an extra kind have step if you like. But yeah... just steps, there we go and just add that directly and it doesn't have to be visible to the customer. And that way it just, you know, shows purchase receipt on the other side as well. And that's just an internal attachment. So now I'm gonna show you another side of things one second. So now from the office view.

OZELLA

38:27 Partsledger... purchase orders, oops... there we go. So this purchase order 111, it's been a status have created, but I know that this was created by Ozella for this job with the description field purchase for job. So I can look at that receipt. Yep, that's the motor that I bought looks good. Ozella purchase this motor. I approve. And I know she did it on the field. That means it's already been received. So I can go ahead and if I need to put some other reference number here, I can and that's done. So I'll go ahead and market received because it was a field purchase. I don't have to run it through, you know, do shipment receipts separately or individual about line item. I can just go ahead and receive it and call it a day. So that's done in terms of from the office, what I needed to do now, looking at that job over in service trade, I'll have to refresh this. So this is that same job in two five four one.

OZELLA

39:39 And you can see there's the motor one was purchased here. It says home depot because I have that configured incorrectly when I set it up. But what Brooklyn? And it is in a status I've received for, you know, 111. So everything lines up. Does that make sense?

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

OZELLA

40:02 In terms of that workflow? It shows here and show them the mobile app. It's all visible also have your attachment there's. The receipt I need it.

13023738099

40:13 Yeah.

OZELLA

40:16 Yeah. So no one had to give you any paper. No one had to call anybody. We push that button, move right along... or there?

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

BRETT

40:26 That. Sorry as though?

OZELLA

40:28 No, you're fine. Go ahead, Brian, I think we're both in the same direction.

BRETT

40:31 Yeah. I just wanted to say, does that use the concerns about using how we initially showed you the job number as the po, but Jessica, you mentioned you don't want the same number for multiple different vendors? Does, what was that will just showed you resolve that for you?

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

13023738099

40:47 Yeah.

BRETT

40:51 And so, while we do have a Ozella here, what other questions are coming to mind? What's important for you guys, Jessica and Becca?

13023738099

41:01 Yeah. I guess I also wanna make sure that the technicians are going to be able to enter their time into here as well. So, yeah.

--- Tech time tracking ---

OZELLA

41:16 Yeah. So you see this is that initial poc event that I just did, and it shows, right? And I clocked in on site now?

BEN

41:24 Clock?

BRETT

41:25 Out.

OZELLA

41:25 Same thing.

13023738099

41:29 Well, what about employees who won't have the app? Like the apprentices... log their time on a job.

BRETT

41:40 Tier apprentices need to see the.

BEN

41:42 Job by any means?

BRETT

41:44 Like would they, even if they're not making changes, but go ahead sir.

13023738099

41:49 To be able to enter time in for their crew is what I'm getting at.

BRETT

41:58 Might Ozella, well, let me, you just said Jessica, like the lead technician might be entering time for the rest of their crew that we said, yeah.

--- Tech time tracking ends ---

OZELLA

42:07 Correct. And that's how it would work. Yup. That's how it would work. Yeah... I just popped out same thing.

--- Tech time tracking ---

BRETT

42:25 And then all this information can be reported on, run a quick report on balk, events in service trade, and that will pull out all the information you guys need for payroll or purposes. Excuse me?

13023738099

42:38 Say, forget the clock in. So a job site or are they able to go back and add six hours on a job or?

--- Tech On-site ---

OZELLA

42:46 So, when they're at a job site in order for them to do any, well, not in order for them and do anything. But when they're in the mobile app, the clock in and clock out becomes very intuitive. I think if anything, it's remembering o'clock out of the job, but the plugin is usually it just kinda.

--- Tech time tracking ---

13023738099

43:06 For example, go ahead and...

BRETT

43:08 Sorry?

OZELLA

43:08 You were asked my editing time, is that what you're asking?

13023738099

43:11 Yeah, yeah.

OZELLA

43:13 Yeah. So if the technician has permissions, then they can go in and edit their time. If they don't then they would need to leave a comment or something like that on the jobs to someone in the office can do it?

--- *Deficiencies* ---

OZELLA

43:26 Yep. And that would just happen, it would show up as a comment and they would just need to do that directly from within the app, you can add a comment and then it can be.

BEN

43:36 Job.

OZELLA

43:36 Comment, they can go ahead and say, you know, when you suggest for XYZ now.

--- *Deficiencies ends* ---

BECCA

43:44 Okay.

BRETT

43:53 What other questions are coming to mind?

13023738099

43:59 I don't know, Becca, you have anything?

BECCA

44:04 I was just wondering about the time and the POS?

BECCA

44:13 No, nothing's coming to mind.

BRETT

44:18 Okay. So, from my notes here, from what we were talking about earlier, it sounds like the biggest hurdle, but sir, I'm sorry, go ahead.

--- Tech On-site ---

BECCA

44:26 How about billing? Can you like fill out a job from here after it's complete?

OZELLA

44:34 Absolutely. Absolutely. So, let's say, for example, this job is complete. Let me actually go ahead and complete the service. So I'm gonna go ahead and do that next, yes, move it to completed finished popping out. Alright. So, you can see here I have completed my service, right? But someone in the office has to come in and say, okay, yeah, this looks good. Everything has been done. All right now. We'll complete the job and this is the one yep complete job and create invoice.

--- ST app contracts and pricing ---

OZELLA

45:12 I can complete the job and create the invoice or I can just go straight to invoicing if I have to do, you know, multiple billings and as a bit of a sidetrack here, for example, in the city where you've got jobs with multiple phases and you may want to Bill at different intervals, you can invoice the job at any time and you can do multiple bills for that job. Now, back to this scenario, we're going to complete the job and create an invoice. I can make a selection here about which items I need to include in the invoice. And since I'm completing the whole job, I'm gonna go ahead and invoice everything, it's pulling over the contract, the same contract and markup terms that were applied to the initial quote that generated the job. So that we were consistent about what we're marketing up and how we're doing it across the board. We're gonna create an invoice from these six items... and it's gonna tell me the invoice total and what my margins in a percentage for that. I can make a decision about whether I want group my service or not.

--- Invoicing ---

OZELLA

46:14 I can add any invoice. Nope. And okay, once that all looks good, I can say send to accounting system... will actually, so pardon me before I send it to the accounting system. I'm gonna want to send the invoice link. And that way I can send it to the customer.

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

OZELLA

46:34 So here, I can make decisions about who's gonna get it. And then I can just type in my additional note and click send. Now, in terms of what that's gonna look like for the customer, it's gonna look like this. So they'll get their invoice, it will have invoice number.

OZELLA

46:52 It'll have the transaction date, location, Bill to all this good stuff, the items and this is all customizable, right? I can make decisions about how this wants to present. You may make a decision that you don't necessarily want it to look like that... detailed level for customer. Right now, I have it at line items with prices, but you can do it with grand total monthly or summarized by type, that sort of thing... saying that same thing. And now it's gonna look a little different, right? It's just gonna have labor arts and then call it a day dependent on how you have your template format. Then you can also view the service details, so that's going to be any information specific to that job.

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

OZELLA

47:41 And this is all 10 of standard with what you might have seen during your demo. Any file attachments. If you've chosen for the customer to see them, it's all gonna come through, they can hit pay now and go ahead and pay it.

OZELLA

47:56 And then they'll just be presented with the ability to enter their details... and that's it, that is the flow for invoices.

--- Invoicing ---

OZELLA

48:05 You've done that. Then of course, you can send it to your accounting system, which in your case, would be Quickbooks desktop.

BECCA

48:21 What if they send a physical check that won't mess up this whole system, right? Not at all. Okay?

OZELLA

48:29 They send you a physical check. You would just, that would be the one instance where you might have it depending on whether or not you want to collect that payment in service trade. If they send you a physical check, then you will have to come over here and say, okay, payment. Let me put the check number, you know, one, two three four. And the date I'll say that it was a check in the amount and save. And so now it's been day?

BECCA

48:55 Not all will copy over to the Quickbooks receive payment option, right?

OZELLA

48:59 No, not this part.

BECCA

49:01 Okay.

OZELLA

49:02 Not this part, this piece, that payment, if they send you a physical check or, I mean, even when they do the credit card payment, the credit card payment will automatically update service trade that it's been paid. And then of course, that payment is going to hit your bank. And if you've got your bank hooked up with your Quickbooks and you'll see the money's but you'll just need to make sure that you tied off and tell Quickbooks it's been paid. Okay? Yep. Yep.

OZELLA

49:34 And then in terms of the Quickbooks mapping, just to briefly speak to that, because I'm assuming you know, part of the ask around the billing is gonna want to understand how it sits over.

--- Accounting ---

BEN

49:44 There.

OZELLA

49:47 You'll have an option once you're setting up an onboarding with us, we'll walk you through your account configuration for Quickbooks. Where do you want new items to say? Are we doing a customer location job mapping? This is the recommended mapping for the most detail and most of our customers do it this way, but you can also use location or link customer only top level customer job.

--- Invoicing ---

OZELLA

50:10 However you prefer to do that. Invoice numbers can be set by Quickbooks so that when you come back over to the job, it's set and you can see it, it'll be, you know, based on that with books numbering system and then you can see that she different options here, invoice class mapping, other.

--- Invoicing ends ---

BEN

50:30 Et cetera.

13023738099

50:37 Right.

OZELLA

50:40 Windows out unless you have other question. Alright, I'll turn it back over to me.

BRETT

50:49 Yeah. So just kind of regroup and I know with daily, Jessica, you went through service trade and the service side of the business today, we focused on project management. Are there any other requirements that you all have for finding a?

13023738099

51:03 Software?

13023738099

51:09 Not that I can think of off the top of my head right now.

BRETT

51:13 Okay. So it's really send you over the Quickbooks information as far as you guys reviewing the integration kind of what Ozella just went through?

13023738099

51:24 I don't think I got that. No.

BRETT

51:27 Okay. No worries.

--- Purchase decision ---

BRETT

51:28 I can send that to you. Typically at this point. Jessica, what we recommend is, you know, getting probably Jeff on the line. We'll probably you guys having a, an internal conversation with Jeff based on what you've seen and these two demos. But if this is something that you guys are interested in, want to dive deeper into, I'd recommend getting Jeff on the line so we can talk through kind of what it would look like to get this in place. But I think it's important for me to ask based on everything you saw. Is this the direction you guys can see Christiana mechanical going or what are we thinking?

13023738099

52:07 I definitely think it's something that we all need to discuss internally and come to a conclusion... together, you know?

--- Purchase decision ends ---

BRETT

52:20 Yes. So when do you think, Jessica, you guys can talk about this internally?

13023738099

52:25 I think we definitely need a few weeks.

BRETT

52:30 Few weeks. So if I call you, what if I call you like the thirteenth of October, which is a Thursday?

13023738099

52:38 Yes, we can do that.

BRETT

52:40 Okay. Is it, who with you? If we actually just put some time on the calendar? No 15, 20 minute call discuss your internal conversation, stuff like that?

13023738099

52:50 Yeah, that's fine.

BRETT

52:52 Cool. How's the, how's nine AM on the thirteenth... eastern?

13023738099

53:00 Well... Becca, you're more afternoon probably afternoon?

BECCA

53:07 Afternoon would be best.

BRETT

53:10 Yeah. What if we do same time as today at two o'clock... so I'll send you both an invite. Actually, Becca, I don't have your email. I don't think... do you want me to just send the invite to Jessica and she could forward it or you can provide it now?

BRETT

53:29 It's...

BECCA

53:29 Just be like Becca and then sell S, ILL at Christiana mechanical dotcom.

BRETT

53:36 Cool. So I'll send you both an invite, you guys talk about this internally. In the meantime, I'm going to send you a bunch of resources that we talked about today

and that you talked about with daily on your initial demo on that. You'll also have my contact information. So, if any questions do come up, you know, your wide awake at three in the morning and take up a question that you should have asked. Ozella let me know, and I'll pass that along to her and we'll get you some answers. But yeah, I think that's the best next move here. And from that internal conversation, if it's we want to dive in deeper, we can set up another meeting... for whatever we need to do from there. Okay? Awesome. Well, Jessica, Becca, thank you so much for joining the call today. I'll also send you a recording of this. You can share it with Jeff... but yeah, if you need anything, don't hesitate to reach out to us.

OZELLA

54:24 Thank you. Hi, everyone. Nice to meet you.

BRETT

54:29 Take care. Everyone. Bye bye.

The End