GONG

ServiceTrade Demo with Ground State Refrigeration Ltd.

Meda Piner with Ground State Refrigeration Ltd.
Recorded on 4/6/23 via Zoom, 57 min.

Participants

SERVICETRADE

Meda Piner
Territory Manager

Will Scott
SDR

GROUND STATE REFRIGERATION LTD.

Mitchell Gee

Topics

Transcript

MEDA

0:00 You beat me in here?

MITCHELL

0:01 Yeah, good morning.

MEDA

0:03 Good morning. How are you doing?

MITCHELL

0:05 Good. How about yourself?

MEDA

0:06 Doing well. Mitchell? Do you go by Mitch or Mitchell? I just want name Mitch. Okay, cool. Awesome. Well, my name's Meda. I'm one of the territory managers over here. So my whole goal for today is really just to walk you through the tool to see if it'd be a good fit.

--- Purchase decision ---

MEDA

0:21 I do just want to start off first with a couple of questions about the business, what you're hoping to kinda solve out of the software and we can go from there. Does that sound good?

MITCHELL

0:29 Sure.

MEDA

0:31 Cool. Awesome. And do you have a hard stop time for me and to make sure I keep this?

--- Purchase decision ends ---

MITCHELL

0:34 No, no, I'm pretty free all morning. So it's all good.

MEDA

0:37 I won't keep you all morning, but I appreciate it. Awesome. So tell me a little bit about as business. I did look you up on LinkedIn. A little bit. Looks like the business started maybe a few, maybe five, six months ago.

--- *Type of work* ---

MITCHELL

0:51 Yeah, that's right. So, we started up a refrigeration primarily just service contractor. We have a couple of small projects but nothing really too in depth. Our primary focus is just service. We have a current service platform with it's called smart serve. Not sure if you're familiar with them or not. But I think because like the like we're industrial more or less like probably like 90 percent industrial and 10 percent commercial and we do no residential at all. I think one of the biggest struggles we've had is most of the platforms seem to be catered to like residential and commercial.

--- *Forms* ---

MITCHELL

1:35 So, one of the main features that we were looking for is we need to be able to generate a server support. And when I say search port, I don't mean like any type of financial report. So, serve report is like all of our notes from the job, the hours, you know, if we want to attach files to it like an excel sheet, say like an inspection form or something and send that to the customer from a technicians level prior to the invoice. Cool?

--- *Invoicing* ---

MEDA

2:06 Yeah, that's definitely something that we can handle over here. Anything else you're seeing that's a disconnect for your industry?

MITCHELL

2:12 A po system?

MEDA

2:16 Hi, are you not doing that on your Quickbooks now?

MITCHELL

2:20 We don't do it through Quickbooks. We like we wanted it to be through our service platform because I mean, I don't know what the process would be like doing it through, you know, only Quickbooks, but I feel like when if you're invoicing through your platform, you need to be able to grab, you know, those, that po information.

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

MITCHELL

2:37 Otherwise it's gonna get too convoluted and you'll probably just start missing things. So right now, on our platform, you can make like office notes. So we're just kinda using like the job number and the date as the po. And then we just put it in office notes with like the vendor. Okay? And that's kind of like before we do the invoice, we'll go through office notes and get all the values for items on the POS prior. But, okay, it would be nice to have like an actual po system built into our platform? Yeah.

MEDA

3:08 I got you. So a couple of different ways people do POS, and I'll kinda show you it through there. But just for you to have like people do it differently. So some people do same way you're doing it, they use service trades, job number and they use that number throughout for the po number and everything. Other people generate that in Quickbooks. And then you can simply add that number into service trade throughout the job to be able to track that.

--- Accounting integrations ---

MEDA

3:34 In service trade, we'll talk to Quickbooks too because we have a native integration with them. So I'll kinda show you how that works. Yeah, there's definitely a couple of different options for that I can show you and, but definitely the service report thing is something that we can easily handle.

--- Type of work ---

MEDA

3:51 And we do just people to do that. Right... now. Tell me a little bit more about the jobs that you guys are doing. Are you guys doing any preventative maintenance? Is it more reactive?

MITCHELL

4:02 Yeah. We do some like we have some contracts with customers which is like a lot of PMS like quarterly PMS.

--- Recurring maintenance ---

MITCHELL

4:10 Some of them are monthly. Great. Right now, in our current platform, you can kinda create like a maintenance program or like how many visits you're doing annually? And then you can basically just schedule it all in one.

MEDA

4:24 Okay. Got you. Are you all looking to build up that preventive maintenance agreements just for you to guys to have kind of a runway for the future?

--- *Recurring maintenance ends* ---

MITCHELL

4:32 Yeah. I mean, PMS are always good. It's you know, it's scheduled work that you can forecast. So.

MEDA

4:38 Yep. Yeah. Absolutely. That's our thought about it too. It's better to be a little bit more proactive have an idea about what's upcoming than kind of flying off the C to your pain sometimes, so.

--- *Type of work* ---

MITCHELL

4:48 Yeah, for sure.

MEDA

4:49 Absolutely. And you mentioned projects like smaller ones, talk to me about that?

MITCHELL

4:55 Yeah. So we're not like they're not really new installed. It's more like re, of equipment and stuff like that. So like, you know, a couple of day projects, nothing really over that right now.

--- *Paper process* ---

MEDA

5:07 Okay, cool. And tell me about a little bit about your text and your office. How many texts do you guys have over there?

MITCHELL

5:14 So, there's three of us total. So myself, I'm an owner and then there's another owner, but we're both in the field during the day normally. And then we kinda just do the office stuff like anything on the back end after hours.

--- *Paper process ends* ---

MEDA

5:28 My gosh.

MITCHELL

5:29 Yeah, it's a lot right now.

MEDA

5:31 You are right?

MITCHELL

5:33 Yeah, it's busy. We do have an account too that helps the kind of check in once a month and like go over Quickbooks and stuff like that. So...

MEDA

5:44 What, what's the like long term goal or even the goals for this year? You know, you're just getting up and running, you're kinda, you've been in this industry for a long time. What's the goals for the business or specifically for this first year?

MITCHELL

5:59 Like the service platform is kinda the biggest thing that's going to be the base of everything, right? We're very particular about a lot of the features that we wanted in our service platform, but so, our previous company we worked for, they used SSO, and we did really, we did really like it was catered to the industrial industry.

--- Accounting integrations ---

MITCHELL

6:23 So it was good and they had all the... that we liked. And it seemed to work. I know the accounts didn't like... just because I think they had to manually enter every I'm not, and I don't I think it might have been because they weren't using Sage as their accounting software like platform, but... we didn't venture down that road and I think it's quite expensive too.

MEDA

6:52 Yeah, Sage is pretty expensive and they make it pretty difficult for people to integrate with them. What we've had to do is build out a custom integration with a third party for us to kinda integrate with Sage. So it, I mean, it's a good platform. I'm not gonna lie. We do have good integrations. A lot of our folks use that, but the majority of our customers either use Sage or Quickbooks. So especially with your company size right now, I would, you know, take my advice if you want it. I'd stick with Quickbooks for a little bit. And then eventually, as you grow, if you out, you know, if you outgrow that system, definitely look at Sage or other options for accounting systems. But yeah, I think you guys are in a good spot, definitely getting a service platform is super important, right? You wanna make sure we start the business off on the right foot and not have to backtrack down the line or whatnot. So, absolutely.

--- Accounting integrations ends ---

MITCHELL

7:45 Tell...

MEDA

7:45 Me a little bit about your quoting and invoicing since you guys are doing all of your office stuff after hours, how long does it take for those? Just? So let's start with quotes, how long does it take for those to get billed out and send out?

MITCHELL

7:58 It's not that hard actually like in the platform, there's like a template I guess, and you can just enter all of your line items and then you can just email it to the customer.

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

MITCHELL

8:11 It's pretty straightforward. So, and then same with invoicing, like if the quotes approved, you can transfer the quote to a work order and then you don't have to reenter all the line items. They're automatically there. And then, yeah, you could just then you can send the invoice. Okay. Awesome.

--- Pricing ---

MEDA

8:34 And how many jobs would you estimate you guys do a week?

MITCHELL

8:40 Right now, we're I think we're at about 200 jobs tickets opened in five months. So probably 10 a week right now. Awesome. And that should ramp up because we hire, we just hired somebody too. So that like we did 10 a week, approximately two of us, which job a day per person?

MEDA

9:03 All looking to the pretend per person? Okay?

MITCHELL

9:09 Or five per person?

MEDA

9:11 Okay. All right, perfect.

MITCHELL

9:13 It would be like ramping up to like 15 a week.

MEDA

9:18 Awesome. Awesome. That's great numbers. Now, are you guys hiring pass this person or is that down the line? Any idea about?

MITCHELL

9:28 Yeah, I think in the future, it would definitely be good and then that would free us up to do more like I could do the accounting and all that. And during the day.

--- *Quoting* ---

MEDA

9:38 The idea to get you guys out of the field at some point down the line?

MITCHELL

9:43 Yeah, for sure. Yeah.

MEDA

9:49 Sorry, I'm taking some notes. Okay, perfect. One more question for you. How many, what would you say? And this is probably a big guess. You're going to have to make your quote approval rate. How many quotes are you guys sending out and how much are you guys getting, you know, approved on?

--- *Pricing* ---

MITCHELL

10:07 We honestly don't send out that many quotes. Like a lot of the customers we've had are their long term customers. So we've been working there for like 10, 15 years and they kinda just tell us go ahead with everything more or less. Okay. Yeah. Like this year, we've probably done... maybe 10 quotes. Okay? Not a significant amount.

--- *Pricing ends* ---

MEDA

10:32 Is there, do you think there's room to build that up?

MITCHELL

10:36 Yeah. I mean, as we grow, we're probably going to be, we're obviously going to be expanding and taking on new customers and they're not going to be as trusting, I would think. So, the process usually is to get quotes.

--- *Purchase decision* ---

MEDA

10:48 Yeah. Yeah. Absolutely. Cool. And then in terms of like time line for kinda going live, adopting a solution in busy period or when you guys look into kinda get up and running?

MITCHELL

11:02 We're not in any rush like we rushed into smart surf just because of our situation. And I think that was a mistake but we didn't really have a choice.

--- Accounting integrations ---

MITCHELL

11:13 So we just, we wanna make sure whatever platform that we pick like 100 percent suits us. And then like all of our needs basically are met. Yeah.

MEDA

11:23 Yeah, absolutely. You know, when you add a plug on or a plugin that, you know, not the systems, bread and butter. I mean, Quickbooks is an accounting system at the end of the day, they have SmartService, and these other things and like varies and connect has a plug in like things like that. It's not their bread and butter. So it's just a system that was built out to satisfy a few and it's a good enough system, right?

--- Quote templates ---

MEDA

11:47 So it works well enough. But then you get down the line just like you and you're like not working very well, yeah.

MITCHELL

11:55 There's just so many manual processes and like just little steps that we don't like... for example, like... if you change the price on like a line item, like you can add markup on it.

--- Quote templates ends ---

MITCHELL

12:10 So you enter the base price on the invoicing section, and then you change the markup. If you're like I don't wanna use like one point three, I wanna go to one point four. It doesn't take it. There's like a glitch in it or something stupid like that. And then you have to start, you have to delete it and then start from the beginning. There's just, there's a lot of little things like... that are just annoying. Yeah, yeah, yeah.

MEDA

12:33 Absolutely. No, that totally makes sense. So we'll definitely see what we can streamline definitely. So, we have something called a service link that you're mentioning like a service report. So I'll show you all of that. And then we'll just walkthrough a work order together and you'll see the flow, see if it fits for you guys. Anything you have anything else you think it's important for me to know before we move on?

--- ST app contracts and pricing ---

MITCHELL

12:54 Job costing. Can you, I think we talked about this. You can enter like job costs into the platform somewhere so you can kinda see how much money you're making on each invoice?

MEDA

13:06 So, so we can see, you know, like we can see margins in there and we can see like per tech, the revenue that they're bringing in.

--- *Invoicing* ---

MEDA

13:15 But I would suggest again doing it, this is probably not the answer you want doing it in Quickbooks and doing job costing that way because we're gonna talk to them and we're gonna update all the information about the job. So for that kind of stuff, yeah, we're going to generate it all and service trade, move it over to Quickbooks. And then you can easily manage that from there.

--- *Access to information* ---

MITCHELL

13:37 Okay.

MEDA

13:38 Cool. All right. So, I'm gonna show you three different views today. The office view the technician view as well as what your customers will see. So, let me change gears here real quick. Can you see my screen? All right?

MITCHELL

13:55 Yeah.

MEDA

13:56 Okay, perfect. So we're going to start off in the office for you today.

--- *Access to information ends* ---

MEDA

14:01 Now, this is just a high level overview of the different work stages or different stages of your workflow. So this is a good snapshot for you and your partner in the office. You don't have a super long time to dig through everything day to day. You guys are off on the job, but you'll be able to get a snapshot of when and where your techs are. You click in here. You'll of course be able to see the work order. If you come down on here, we have overdue jobs without appointments and jobs without appointments next due in the next two weeks. This is great for a snapshot of what's upcoming for you guys not to have any jobs slip through the cracks. All your preventative maintenance jobs will come up here when they're you know, do you

guys can go ahead and schedule those out? So if you guys are scheduling out for the future, say you're super busy, you can't do this job for three weeks, go ahead and create the work order. We're gonna put it in this bucket because it's not scheduled yet just to keep track of that.

--- Tech On-site ---

MITCHELL

14:58 Right.

MEDA

14:59 Then we need, we have jobs to be marked complete and jobs that need to be invoiced. If you can see on the right here, you guys are pretty smaller teams. Is it not be super necessary for you all? But we can see clock events. So we'll see when and where your tech clocks in it'll.

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

MEDA

15:16 Put a pin on their location as well. Any questions about this? A high level? Okay. Perfect. Now, let's get into. We call them jobs over here. Their work orders. Now, I mentioned earlier about having a po number, this managed job button right here. All you have to do is put in the po number right here, and it's going to be attached in the invoice? And all that information is gonna carry throughout the job.

MITCHELL

15:45 How about like vendor POS?

MEDA

15:50 Yep. We can do that and the job items down here. So we can select our source for our vendor and then put our po number in there as well.

MITCHELL

16:00 Okay.

MEDA

16:01 We'll have a list of like different vendors and stuff that we can add in here when you guys get onboarded to. So he would be generated in your Quickbooks. So this is one way if you wanted to generate your po in your Quickbooks, you generate the number. You come over here to manage job with the gear button and then type in the po number that you got from your Quickbooks, or you could just use this job number as your po button or as your po number throughout the whole process.

--- Purchase decision ---

MITCHELL

16:36 Up.

MEDA

16:36 To you guys. How you wanna do that? I can give you a little bit more kind of like materials on that moving forward if you want to. After a meeting. It's for you to kinda dive in and see which one do you think might be a better fit for you?

--- Tech On-site ---

MEDA

16:49 Sure. Cool. So we have our job here that's scheduled. And I made up these numbers. So if they don't look accurate, they're not. So we scheduled to go out. We have our technicians there. We of course needed to add another technician. We could, but it's just a description of the work we even asked to made a duration.

--- Quote templates ---

MEDA

17:11 You can see that this is a one time service and it's scheduled for a single day. Those can both be adjusted if needed to be to custom date ranges and things like that. Our parts labors and items are gonna pull over that are consistently used on these jobs. Now, if you know, ahead of time that you're gonna need to add a part, you can just go ahead and add that part down here. We'll pull in and I should have asked you this at first. Do you guys have like parts on hand? How do you all do with that? Okay?

--- Parts management (inventory) ---

MITCHELL

17:43 Yeah, we like some of it is not really inventory but there is some stuff that is.

MEDA

17:51 Okay. I got you. So, yeah, if you need the part, you could do it there, an item, but your tech can also do that in the field as well. Any attachments and any comments as well.

--- Assets ---

MEDA

18:03 You guys can add in here to give a little bit more clarity to your tech or whatever you needed in there. If you have, you know, a vendor BI or whatnot, you could put that in here and attach it... gonna scroll down. And we have our asset that we're working on today. If you guys are working on multiple assets at the location, each asset will pull up that you guys are working on that day. So these are all the assets for this location, but we're just working on this freezer right here. Any questions about?

MITCHELL

18:38 No, no.

MEDA

18:39 So, we kinda talked about earlier, what a service link was, you can do that at any part in the job cycle.

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

MEDA

18:46 But I'm gonna show you what it looks like before we send it out or what it looks like before we do the job. So it kinda details and services that you guys are there to complete the parts and items used or you're going to use any comments, you guys have any files and any alerts? I'm gonna show you what this looks like, post the job. You can do this at any point during the job. You just email it to them. It's super simple. Is this kind of what you were looking for though in terms of like a service?

MITCHELL

19:16 Well, I think so. Yeah, I'll see once I see the report, I guess. Yeah.

--- *Access to information* ---

MEDA

19:21 Yeah, absolutely. Cool. Awesome. So let's change gears real quick and go to the tech app. Now, I'm assuming all of you guys are on like iphones, androids, tablets. Okay, cool. So, I'm using my iPhone today, super simple. But all you, your techs have to do is log into their app in the morning. It looks like there's a little bit of a lag, give me one second.

--- *Access to information ends* ---

MEDA

19:56 Give me a second. Sorry about that.

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

MEDA

20:13 All right. Now, we're kicking it peanut oil. Okay? So your text will be able to log in and see what jobs they need to perform that day. They'll have a list of all of them here. I only have one today, but all I need to do is click into this job. Now, I can clock in saying I'm on site. I can also clock in saying I'm on route and notify the customers a lot of folks like you do this. You obviously don't have to if you don't want to.

MITCHELL

20:41 Okay. And I'm just...

MEDA

20:42 Gonna clock in. And now, I don't have any additional administrative work.

--- Quote templates ---

MEDA

20:47 When I get in here, I'm gonna be able to click into my service, see what I need to perform. If I needed to add, say a job item, I could click into there and add a part or item. Let's say we're using this black pipe. We used one, our item cost is eight dollars and this, the item cost will typically pull over from the rules that we set with you guys in the beginning. So we're gonna add that. I can see, you know, how much refrigerant we used. If I needed to add more units, I could easily edit that and add more units or just mark that all those were used. Does that kinda make sense?

MITCHELL

21:25 Yeah, cool.

MEDA

21:29 You can add parts and items.

--- Assets ---

MEDA

21:30 They can look into the asset and click into the history of the asset. Now, I just created this asset. So we don't have any history here, but you will be able to scroll down, see all the, you know, model number, the location, all that stuff. And if it did have history and let me show you what that would look like. Let's just go into this hvac unit. If it did have history, we'd be able to click into the history and click into there and see whatever we've done on the past jobs to make the right recommendation this time. And we can also see all the deficiencies. So those are all the repairs that we have done on this particular system.

MITCHELL

22:06 Okay.

MEDA

22:10 Seeing so far, you kinda think this fits with your workflow?

MITCHELL

22:13 It, yeah, where would the tech enter? Like all of their notes and stuff?

MEDA

22:18 So we have comments here so they can go ahead and add a comment there. I didn't add a comment. They can also add any kind of attachments in there and any kind of paperwork.

MEDA

22:34 Do you guys typically like when you go out and do these jobs, you have a repair that you find? Do you, are you guys able to typically complete that repair there? Or do you have to set up a second visit?

MITCHELL

22:45 Lots of times there's like a follow up doesn't...

--- Dispatch ---

MEDA

22:48 Okay. And how are you guys logging that? Keeping track of that and everything?

MITCHELL

22:54 So usually there's like a job complete button or like reschedule that you would use to update the work order... and that's kind of how we would gauge it. And then you can there's like an overview of the work orders, and then you could filter them by like open jobs and stuff like that to see.

--- Deficiencies ---

MEDA

23:17 Okay. Yeah. So how we do that? Of course, you could go ahead and schedule that second visit on their phone, but we need some way to log that, log what's going on. So the office and everyone else can have visibility of what's going on in this job. So what we do is we click into deficiencies and we click add deficiency. Again, all the deficiencies for this location is gonna pull up. But let's just say we just have a broken, gonna use compressor as in an example, you have a broken compressor. I don't have to add a ton of description because I can add photos, videos, voice memos, whatnot the whole point of that is to make like give your text a little bit more time back in their day to do the things that they need to do. We don't want them to do so much admin work. We wanna make it easy on our text and on the back end easier on our office. So we're gonna take a photo of what's going on because pictures say a 1,000 words. You can add as many as you want in there as well. And then we're gonna mark the severity. So I was in inoperable deficient or just a suggested repair. Let's say it's an operable. We're gonna tie it to an asset. I just tied it to the boiler. That was my bad. Let me redo that. That's I'm sorry... I just want to make sure we keep those together.

MEDA

24:46 And typically folks can just go back and fix it. I'm scrapping the whole thing and just redoing it. Yep so, and then we can mark the current status of the efficiency. So if you're able to fix it in the field, we'd say fixed if it's new, and we weren't able to fix it.

--- Tech On-site ---

MEDA

25:03 And we need to schedule that second visit. We're just gonna go ahead and say it's new. And now we've added that deficiency and all this information is being pushed to the office right... now. You can create a pre work acknowledgment in your phone or a post work acknowledgement.

--- *Access to information* ---

MEDA

25:20 Again, everything's permission based. You can also generate an invoice, if you don't want you guys to be able to do that. In the field, you just wanted to go through the office. You know, we can set up those permissions that way, but you're able to kinda show your phone to your contact there, whoever to say, hey, we did this day.

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

MEDA

25:40 You want to sign off on it. They can just hand them their phone. They'll look at the details and they can sign right there and all that's documented as well. So we can do that pre or post the work. And then I didn't mention this earlier, but of course, you can have comments in here like gate codes, things like that to give your text, more clarity. Any questions about the mobile?

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

MITCHELL

26:02 How do you, so, can you send all of the notes and everything like files to the customer from the app?

MEDA

26:11 You...

MITCHELL

26:14 Cause that would be kinda like what I'm talking about, the service report?

MEDA

26:18 Got you. Got... you. So, not like an invoice.

MITCHELL

26:24 No, not in numbers.

MEDA

26:27 I would say the work acknowledgement. So it has, you know, the service that you guys completed all those details there? Any comments from your text as well?

Any deficiencies that they found the files and photos, all of that and the job items used?

MITCHELL

26:47 Yeah.

MEDA

26:47 So that's what you could send to them for review, they'll review all those details.

--- Tech On-site ---

MEDA

26:53 You know, they'll click into the service. All of that, of what I just clicked into and then they can confirm that and confirm and sign with their first and last name and they could get sent a copy, yes.

MITCHELL

27:05 Okay. Could you get, yeah, could you show like the hours that the tech enters on the job as well?

MEDA

27:14 Yeah. So they'll they have one labor.

MITCHELL

27:17 Are here that?

MEDA

27:18 We used.

MITCHELL

27:20 Okay.

MEDA

27:21 Absolutely. Let me mark off that we use those services. I actually didn't mark them off.

--- Tech On-site ends ---

MEDA

27:38 All right, cool. Let me send that to you real quick.

MEDA

27:51 What's your email?

MITCHELL

27:53 Refer... EFRIG... dot C a.

--- *Forms* ---

MEDA

28:17 Cool.

MITCHELL

28:18 So, once, can you enter email? So they kind of auto populate?

MEDA

28:24 Yeah. So those auto populated because I don't have you in there in the system as a customer, it auto populated mine because I'm technically the customer over here, but absolutely. So I have you as a new contact now.

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

MEDA

28:38 So I'll take you off. So I don't send this to you in the future, but absolutely, as soon as you enter in that contact, it's gonna go ahead and create it in here and save it in there for future use. But if, you know, when we set this up in the beginning, we're gonna get your customer details, location, details, all of that will already be tied.

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

MEDA

28:57 So you won't have to do what I just did to add someone else in there unless it's like a new contact or something like that.

MITCHELL

29:04 Okay. And can you send it to multiple people? Yeah, absolutely. Like you don't have to do it individually. You could do it all like.

MEDA

29:13 No, so you can send it to them all, only one person will be able to sign. So one person would be like the lead signer, and then the other people would, could just get a copy.

MITCHELL

29:23 Yeah. Okay. But you could, one person could send to three people all at once. Okay?

--- Paper process ---

MEDA

29:30 Correct. Yep. Absolutely.

MITCHELL

29:32 That's another problem with our... like a lot of sites, you know, the one supervisor, and then the maintenance team. So I need to go to like three different... emails and we're having to manually enter it in each time, just a longer process.

MEDA

29:55 It's a pain. Yeah, absolutely. So they're able to do that through here. Did you get a copy of that?

--- Tech On-site ---

MITCHELL

29:59 An idea? Thanks.

MEDA

30:01 Okay, cool. So from here, we're done with the job. We can just go ahead and clock out, mark off our services that are complete and finish clocking out. And now the office is getting kicked with all of this information. So the deficiency that we just found that we need to go back out and repair again, your tech can go ahead and schedule that out through their phone.

--- Deficiencies ---

MEDA

30:25 But if you wanted to keep things through the office, you could also do that. So your office is gonna get a record like this so you can send it to, you know, you and your partner, whoever else you want to send this record to. And it just stay, you know, what was found at which location during what job?

--- Assets ---

MEDA

30:44 So you can click into this record here. And again, it's gonna pull up all those details. So we have a report that's already made for us. It's still tied to the service jobs. So we're keeping this all under the same job. You can have multiple visits under the same work order, but it's gonna connect all the valuable related deficiencies.

--- Tech time tracking ---

MEDA

31:05 So any past repairs as well, any path quotes, any comments your tech had in the field will also be held here. And of course, that attachment was the photo of the deficiency that we found.

MITCHELL

31:19 So when the tech does it automatically calculate the hours for the techs time card or can they like the hours that they enter like labor on the line items? How does that work?

MEDA

31:37 In terms of like do you guys have minimums, is that what you're asking about or just?

MITCHELL

31:40 Just.

MEDA

31:41 In time?

MITCHELL

31:42 I don't want like we won't go by the clocking clock out feature, like we don't use that. Okay? We don't want the time to be automatically entered. We want the tech to manually enter like four hours for this job.

MEDA

31:54 Yeah. Yeah. Yeah. They can absolutely do that when I had the sets open or the parts open, they'll just mark off how many hours and then that will be translated on here because, and I'll show you in a second.

MITCHELL

32:07 Will that go like, can you do time cards through service read?

--- Invoicing ---

MEDA

32:12 We do have time cards but it doesn't work and you guys have office, not desktop, right? For Quickbooks, you have Quickbooks online. Sorry, not office. So our time card only works for Quickbooks desktop, unfortunately.

MITCHELL

32:31 Okay. But you will.

MEDA

32:34 Pull all this time out and use it against your other, your Quickbooks in your payroll system to kind of.

--- *Recurring maintenance* ---

MITCHELL

32:41 You could generate, you could generate a report for an employee for like a week, yep you, or somewhere.

MEDA

32:49 Absolutely. You can do that. You can generate a report for revenue generator report on, you know, what, what's kinda going on, invoicing, things like that. So anything that you put in here, you're going to be able to generate a report from? Okay?

--- *Quote templates* ---

MITCHELL

33:06 Because we, the time cards aren't really that important, but you do need to be able to see the hours that a technician entered in, you know, in a week basically, so you could transfer that into quick and pay them. Okay?

MEDA

33:20 That makes sense. Absolutely. So, I know you guys don't do as many quotes as a lot of others, but if this is a new customer, we need to go ahead and add to a quote, we can go ahead and create the quote. Now, do you have different pricing contracts for your customers or would it be like a typical blanket standard?

MITCHELL

33:40 They would all differ? Yeah.

MEDA

33:43 Okay. So you'd be able to come up here and pull down the different contracts that you have... and be able to apply those pricing roles and stuff. So we have our service parts and labor. Now, you mentioned you guys use quote templates. We do the same thing. So you'll be able to pull up, you know, a typical template that you guys would use for this compressor replacement and add all those details. And so we have a quote description up here. Of course, you're able to adjust that. We have our service that we need to go back out and perform.

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

MEDA

34:17 Now, if your tech had already rescheduled that on their phone, it would already show that it's rescheduled here. We haven't rescheduled it yet. And those parts and items are gonna pull over as well. Any comments and the attachments to. So from here, all we're gonna do is send our quote to the customer.

MITCHELL

34:37 Okay. We.

MEDA

34:38 Can toggle off our comments. So if we don't want our customers to see the comments, we don't want them to see our voice memos, things like that. You can pick as many as you want. Excuse me for this to be sent to. So I'll send that to you real quick. Let me preview this. But I'll also send this to you for you to get an idea of what that looks like... either what our quotes look like. They're gonna have a big approve button and a big request changes button. And then we'll have your logo up here, a description of the work services we completed. And again, this is just a mock up. So all will look a little different. But if you wanted different levels of detail, like you didn't want the quantity or, you know, a description of the prices, you just wanted a grand total, we can tailor this down to, you know, whatever level of information you want to send, any files and photos, terms and conditions, how does this kinda look compared to the quotes you guys are sending?

--- *Quote templates* ---

MITCHELL

35:39 It's pretty similar. Yeah. Okay. Let's see there's. No problem.

MEDA

35:44 Cool. So they're able to save that. If they need to print it off. Whatnot... I'm just gonna go ahead and approve that for us. So I've approved it. Now, we can either add this to an existing job or create a whole new job from the quote.

--- *Quoting* ---

MEDA

36:02 So quotes approved. Again, we're gonna get history of these. So I can see when I emailed it when it was approved, all that Jazz. And then we're just gonna add this to our existing job. We wanna keep these together. Again. You can keep them separate if you wanted to close it out and go back and reopen it.

--- *Dispatch* ---

MEDA

36:20 I think that's kinda silly. And here, if we wanted to go ahead, our quotes approved, we need to schedule our tech out. We'll put their name on there as many texts as you need on the job, hit this gear button, put a due date and it's scheduled on their calendar.

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

MITCHELL

36:35 Okay.

MEDA

36:36 You can also click right here and just say it's gonna be done right there and it's scheduled. So this job will show up as completed because we've already done that. This one's scheduled to go out today and parts and items are gonna pull over. We have our labor hours here.

--- Tech time tracking ---

MEDA

36:54 That showed that we use three hours. We still have our clock events down here. I mean, I was there for a total of nine seconds, right? They were there for three hours. So that's what's gonna show is what they mark on their parts and items list. We're not gonna show the clock in and clock out. This is for all, you know, on the back end.

MITCHELL

37:17 Yeah. And then, so you can generate a report that will grab just... the labor hours from, yeah, it's gonna.

MEDA

37:28 Yeah, it's gonna pull labor hours and revenue as well from a certain date and time period. But of course, those are going to be like split up into columns.

--- Tech time tracking ends ---

MEDA

37:40 Cool. And you can do that from whatever date range you want if you want it on an individual basis. If you wanna look at everyone as a whole to compare, however you wanna do that, absolutely. Yep. So remember, we have that deficiency record here as well. So everything's gonna stay nice.

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

MEDA

37:58 And together, we have our documentation, our comments. So our documentation right there was the work acknowledgement that I sent you. So you guys will also get an idea of what that looks like. We'll get that logged in here. Now, from here, all we need to do is invoice a job. Again, we could send the service link now if we wanted to. So we can see that we've done this for service. We haven't gone back to do this repair here's, the items and parts. We've used three hours of labor if you want. Like again, any level of detail you want on here, you'll be able to kinda determine that the alerts would be the broken compressor, the photos, things like that. Any files? So that's a work acknowledgement, any forms that you guys any paperwork? Anything that you digitalized and put in here will show up here. So, yep, that's a service link. Any comments down there as well? You guys could write to send them for this. Now, we haven't gone back to do our second repair and that's why it's not clicked off yet.

MITCHELL

39:05 Is there a field? You can put a customer signature on the service line?

MEDA

39:13 Why would you need that if you get the acknowledgement?

MITCHELL

39:19 The, so like service reports are signed by customers usually. Okay?

MEDA

39:27 I do not believe so. So I'm gonna leave that as a no, but I will double check with my team to see if I'm wrong.

--- Tech On-site ---

MEDA

39:33 Okay. Absolutely. So we've gone out. Let's say we magically went and done the repair. We're going to complete the job. And now we just need to create the invoice.

MITCHELL

39:48 When you, sorry, when you set the service, like earlier, didn't when you scroll down, wasn't there like a signature that you put in there?

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

MEDA

39:57 Service?

MITCHELL

39:59 Yeah... I thought you signed something when you sent it, and when you entered my?

MEDA

40:08 I sign the work acknowledgement.

MITCHELL

40:11 Okay. But does that show up any?

MEDA

40:13 So, that will show up here in your service link as well. So, when I pull this up, I see my files and this is really small hold on.

MEDA

40:27 Let me pull this up larger so that's the file that's a work acknowledgement that I sent you as well. So this has a services that was completed parts and items use the quantity of that. The deficiency reported, any disclaimers, anything like that. And the signature is what they sign in the field?

MITCHELL

40:48 Yeah. Yeah, that's what I was talking about. Okay?

MEDA

40:51 So, it's yeah, it's on the work acknowledgement. Yep.

MITCHELL

40:54 And this is what you would have sent to me in the first one, right?

MEDA

40:59 I believe I sent it to you. Yeah, I did... is at 1,117.

MITCHELL

41:10 Okay. Got it. Yeah, cool. Yeah.

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

MEDA

41:17 Just switching that workflow to gathering the signature right there. And then they'll get a report from.

MITCHELL

41:24 Yeah. Sorry, I was just looking, you have to go like I was, just when you open it up, it goes details and then it just has like... yeah, yeah, you an overview of everything, and then you go to files, I guess. And then it's...

MEDA

41:37 Yep. Absolutely.

MITCHELL

41:42 Okay. Is there a maximum number of like characters or files that you can attach to the work acknowledgement? No?

MEDA

41:50 No... yeah, we have folks who do like infrared scanning and they'll literally take videos of the entire process. It's like hours long, absolutely. No.

MITCHELL

42:01 That, that po section that would be where you would enter the customer's po?

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

MEDA

42:07 Absolutely.

MITCHELL

42:08 Give you. Okay.

MEDA

42:10 You could put that up there and it'll pull from the, you could just put that into the job. Let me go back into here, manage the job. You can put the customer's po button in there. And then it'll translate onto the invoice and all that stuff later on.

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

MITCHELL

42:25 Okay. So that'll translate to the... did you call the work acknowledgement?

MEDA

42:33 Yup, the work acknowledgement, the invoice, whole thing, it'll put it on all of those really.

MITCHELL

42:39 Okay. Where, so under services completed, it has all those line items like one, two three four and five. Did somebody? So you would have had to manually enter that in for the tech or is that like the job description?

--- *Assets* ---

MEDA

42:53 Yeah, that's like a job description. So, like whenever someone calls and says, hey, this is broken like that would be your description. This is a fake thing that I wrote out. Yeah.

MITCHELL

43:02 Okay. So you don't have to really like if I just wanted to enter like service cooler, you could just put that, yeah. Okay.

MEDA

43:09 Yeah, absolutely. It's your account, do what you want. Yeah, you can put as much detail or as little as you want. I mean, you guys, it's a small enough office to where I think like you've been doing the same jobs over and over again. So you can definitely grasp that without having to hold your hand throughout the different steps.

--- Invoicing ---

MITCHELL

43:26 And then if the job was completed or like not completed, does it show on that as well?

MEDA

43:32 Yes, absolutely.

MITCHELL

43:33 Okay.

MEDA

43:36 So, from here, we're gonna invoice again, we could have done this in the field if we wanted to. But if you just wanna, you know, batch all your invoices at the end of the night, we can do this again.

--- ST app contracts and pricing ---

MEDA

43:47 We see our gross margin up here versus our total. You're going to be able to see reports on that. I don't like the way my margin looks. So I'm gonna add, you know, let's triple this price. Let's make this 500 dollars.

MITCHELL

44:03 How does it know the margin though? Does it know like the... I see... so you enter the unit cost like your cost basically.

--- Quote templates ---

MEDA

44:17 Correct. Yeah. So when you guys put in parts and items in here, you're gonna put in the unit cost, and then the price that you guys are gonna sell that unit, we'll do roles that way.

MITCHELL

44:28 Okay. So.

MEDA

44:30 So, from here, there's a couple of different ways of sending this to your Quickbooks.

--- Invoicing ---

MEDA

44:36 You can hit this button and hit submit and it's gonna push all this information to your Quickbooks. That is how I would suggest to do it until you guys, you know, get your feet wet because once you put something into Quickbooks, it's a nightmare to take out and adjust any accounting system and that back. But we can set it up on a 24 40 hour sync however you want it. But again, you can also just want to double tap submit and it's...

MITCHELL

45:05 Okay.

MEDA

45:07 So from here, we are going to send the invoice link... and I can send it to you again actually.

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

MEDA

45:26 Don't worry. I'll take your email out of here. So you don't get sent a 1,000,000 of be week. Cool. So this is what our invoice will look like again as much level of detail that you want. All that will be down there. You can break it up. If you wanna put all this stuff together. However you want this to look, you can tailor that terms and conditions, all that Jazz. And then we also have our service details linked here so they can go in here. Of course, see that both of our jobs are crossed off and stuff.

MITCHELL

46:07 So, at the top left transaction date, is that automatically the date that the invoice has sent or the date that the invoice has made or?

--- Invoicing ---

MEDA

46:21 Actual date? Is that's a good question? I believe it's the date that it was made, but let me double check. I'm not 100 percent.

MITCHELL

46:30 So that's a problem on our platform right now is like when we create the invoice, it automatically generates the date that it was made.

--- Invoicing ends ---

MITCHELL

46:38 And then we send it, say like a week or two later. And then the due dates off and everything's off. We have to actually look back at the day we sent the email to see, you know, to follow up when the invoice was due.

MEDA

46:54 Okay. So what do you want this date to be?

--- Invoicing ---

MITCHELL

46:57 When the invoice is sent to the customer, okay. And then, so if we put in net 30, it would automatically calculate 30 days for the due day.

MEDA

47:11 Yep, absolutely. Let me go back. I don't yeah. Okay. Yeah, yeah, yeah, you can adjust this transaction.

MITCHELL

47:25 Okay. Yeah, we don't have the ability to do that now.

MEDA

47:27 Yeah. So you can go in here and put it in whatever date that you want. Our due day is gonna be, you know, 30 days out. So it'll be what was it? The fifth? Yeah. So we can update that invoice and then those are updated. And of course, we'll be updated on the invoice that we send.

MITCHELL

47:45 But if you did put net 30, would it would automatically generate that you don't have to manually enter it?

MEDA

47:53 I think you, I think you would need to manually do that. Do you guys, is it always you, the due days, 30 days after? Yeah. Okay. Let me double check with our team because that might be something in permissions that we can set up in the beginning for everyone if it's like a recurring process. Absolutely. Let me double check.

MEDA

48:18 The job is completed. We've invoiced it, the invoice is sent, we'll send it to our accounting system and we're good to go.

MITCHELL

48:26 So, this status, will that automatically update to send when you send that?

MEDA

48:32 Absolutely.

MITCHELL

48:34 And then...

MEDA

48:34 Of course, you get a history.

MITCHELL

48:36 Yeah. When it's paid, you just go back in and update it.

MEDA

48:40 It'll come in as paid?

MITCHELL

48:42 Automatically. So, like are all of our customers pay like eft basically or check? So manually having to enter that in?

MEDA

48:54 So, you would have to manually do that. If you were doing like a check or cash, you would come in here and put the reference number, all that Jazz, save it and it'll push into your Quickbooks as well.

MITCHELL

49:04 Okay. And really? So it'll push into Quickbooks from the platform. Yep. Absolutely. Do you have a platform that you use for credit card payments that integrates with?

MEDA

49:24 I mean, like they're able, what do you mean? Because like on the invoice, they're able to pay now and just put in their details.

MITCHELL

49:33 Through your just through your platform.

MEDA

49:36 Yes. Yeah. Yeah. Yeah. So they'll be able to click in here, pay with credit card or a CH?

MITCHELL

49:43 Can you, so, is that a feature that?

MEDA

49:45 Wait, I'm sorry, you're in Canada. I'm so sorry. I did not mean to just say that apologies because of the pay now button does not work for you guys up there. Okay. Sorry about that. I totally forgot that you guys are in Canada that's the only biggest difference is they want to be able to pay now through here. That button actually wouldn't be there. So you can do one of two things. You can still do it this way, send them the invoice. And then since most of your folks pay with check, you can put that in here and send it to your Quickbooks. Or if you want to, you can push all this information into your Quickbooks and invoice through your Quickbooks.

MITCHELL

50:28 Right. Okay.

MEDA

50:30 Yeah. Sorry about that.

MITCHELL

50:31 Yeah, because I think you can pay credit card for Quickbooks for sure. Yeah.

--- *Invoicing ends* ---

MEDA

50:36 Okay. Okay. Cool. Awesome. Now, I know I threw a lot at you there. You know, we're able to cover a lot of the stuff that you wanted in terms of having, you know, a service platform in general, being able to send out customer info, stuff like that. Do you wanna get into pricing now or do you have any questions for me?

--- *Pricing* ---

MITCHELL

50:59 Yeah. We can get into pricing.

MEDA

51:02 Okay. Give me two seconds. Now. Another thing that you're not gonna like is we do charge in usd.

MITCHELL

51:11 Yeah. Our current platforms in us.

MEDA

51:16 About that. I never get a good response from it, but, you know, I can't do anything about it, unfortunately.

MITCHELL

51:24 That's fine.

MEDA

51:26 Okay.

MITCHELL

51:27 So...

MEDA

51:30 To be fully transparent with you, we do have a five tech minimum now, you don't have to have five techs to use this, but we will be charging you based off five techs. Okay? So for your annual subscription, it's gonna be 5,340 that's just for the tech licenses.

--- Access to information ---

MEDA

51:50 Office staff is free. But since you guys are tech in office, you'll need a tech license as well, but it does give you a little bit of runway to grow if you ever move into that and we can transfer over these texts. So say you stop going in the field, you add another tech.

--- Pricing ---

MEDA

52:09 We can just transfer that license over to that other tech. We don't have to buy a whole new license. Does that make sense? Okay? So for your onboarding, we do have a one time onboarding fee of 1,750 again usd. I have, I don't know what your exchange rate is over there. So I fully honest with you.

MITCHELL

52:29 One point three nine.

MEDA

52:31 Boost Dan... sorry, your first year, we're at 7,090 dollars every year. After that, it's 5,340. Now, in terms of onboarding and what that looks like, we're not gonna give you the tool until you could look because that'll be a nightmare.

--- Implementation and ongoing support ---

MEDA

52:52 We're going to train your staff, train your office, help you guys get up and running as well as meet with you guys about once a week once every other week just to make sure everything's running smoothly for the first two months. So, you're definitely going to hold your hand through this process. Make sure to work out anything we need to. And then you guys will be off to the races.

--- Implementation and ongoing support ends ---

MITCHELL

53:11 Okay, cool. It's not awesome. The other one we were looking at was significantly more. What were you guys looking at? What was it smart? Something just a sec?

MITCHELL

53:51 Building BuildOps?

MEDA

53:54 God... do you wanna have an honest opinion?

MITCHELL

54:00 Right.

MEDA

54:01 An honest opinion, like a non sales opinion sure.

MEDA

54:10 They're great. I don't think there's anything wrong with the system necessarily. I think the system is fine. They are onboarding more than they have the capacity to. So they threw out a ton of discounts or essentially like giving away their platform. They'll go. They'll match whatever number you get them. If you're gonna go for like a... just let me pop. I like the, I have good respect for people in this industry, but we hear from a lot of people with BuildOps that they, they're just the service window is supposed to be like 60 days and they're five months out and they haven't even on boarded yet.

--- Pricing ---

MEDA

54:48 So just be careful about onboarding with them and just making sure that you guys are understanding of the service window and kinda hold their feet to the fire if you do go that route.

MITCHELL

54:59 No, we're definitely, the cost is just is too expensive. Well, you said that they would match anything, but they quoted us 12 grand us, yeah.

MEDA

55:15 As well.

MITCHELL

55:15 Yeah.

MEDA

55:17 It's ridiculous.

MITCHELL

55:17 Just like 15,000 dollars... so.

MEDA

55:22 For three text too.

MITCHELL

55:24 Yeah, they're similar to you like they have a base cost for, I think it was five technicians too, and we're under that, so we don't we didn't really have a choice but gotcha. Yeah.

--- Purchase decision ---

MEDA

55:37 Awesome. Well, I appreciate meeting with you today. Do you have any questions before we jump off here?

MITCHELL

55:42 I don't think so. No, I think that covered most of the issues we were having with smart serve.

MEDA

55:50 Yeah. So I will send you a recap and proposal. Is there a time that we can meet to just discuss any questions that your partner has? Anything that we can get ahead of that you think your partner will be most concerned about?

--- Purchase decision ends ---

MITCHELL

56:03 Maybe like a week or so. Maybe it's like Easter is coming up and then... we're actually off Monday to start... maybe like the thirteenth or the fourteenth, maybe.

MEDA

56:17 I was looking at the thirteenth as well. I'm pretty open you wanna do same time the thirteenth?

MITCHELL

56:23 Sure. We can do that.

MEDA

56:24 Okay. And I'll follow up with you. I know things change all the time, but I do appreciate it. I'll send you this stuff. I'll send you a recap of our meeting today, but I'll also send you like a three minute video because I'm sure you're partner doesn't want to sit down and take an hour, but opportunities there if you need it. Yeah, if there's anything else you need, just let me know. I'll send you my cell phone number. So feel free to text, call, email me at any point.

MITCHELL

56:51 Okay. Awesome. Thank you very much. I appreciate it.

MEDA

56:53 Yep. Thanks. You have a good rest of your day Mitchell.

MITCHELL

56:56 You too. Talk to you later.

MEDA

56:57 Bye.

The End