ServiceTrade Demo with Helios Service Partners

Brett Griffith with Advanced Climate Solutions, Advanced Mechanical Service, Commercial Coolants, Inc., Design Air Systems, and Helios Service Partners
Recorded on 12/14/22 via Zoom, 1 hour 26 min.

Participants

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Transcript

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

BRETT

0:00 Man.

CHRIS

0:01 Good morning, mister, Brett.

BRETT

0:05 Because that's what my mom called me when I was like to keep everything and say that I laugh... that's funny... but now I'm ready for this.

BRETT

0:20 Just to confirm or partsledger only if they bring it up, right? Right? Okay. What about blank? Paperwork?

CHRIS

0:31 Like we should talk about it?

BRETT

0:33 Okay.

BRETT

0:38 And then from there, that'll probably open up the service performance conversation. We're not right?

WILL

0:45 We'll see. Wow.

CHRIS

0:48 Good thing you're going to be running the field because my phone is not sinking up.

BRETT

0:53 To make sure mine works.

BRETT

1:02 Yeah, I'm good to go.

BRETT

1:07 Alright. So, I will kind of let you take it away. I'll take all your notes and then take over from the field and pass it back.

CHRIS

1:14 Yeah, I'm gonna kinda talk about the, I'll go through the slides, introductions, go through the slides, data model... build out a, show them a PM, kick it over to schedule out a service call, kick it out to you, let you run the field and... we'll go from there.

BRETT

1:33 Okay. Cool. Yeah, we'll out.

CHRIS

1:36 Yeah, we'll come back to the office. I'll do the deficiency quote and close out that job and see where it goes from there.

BRETT

1:42 Okay. Sounds good. Let's see. We got will on the waiting room you want them, and now you wanna wait for everyone?

CHRIS

1:50 Sure. We can let them in.

CHRIS

2:05 What's up? Well?

WILL

2:08 Chris.

CHRIS

2:09 Well... doing well. Where are you located?

WILL

2:17 I'm in Chicago?

CHRIS

2:19 Okay. Yourself, I am in marriage.

WILL

2:24 Okay.

CHRIS

2:27 Headquarters for us though, is Raleigh, North Carolina?

WILL

2:30 Okay. Got it.

CHRIS

2:36 Or some folks from your side, right?

WILL

2:38 Yeah, Chris sharp is going to be late. I'm Kat is also going to be late. It may be me just to start and cash maybe joining as well. We had a bit of a crisis internally this morning if you're recording it though, which I think you are, then I will make sure they get the recording and then they'll probably watch it tonight. And then we would usually send over our fall questions and stuff tomorrow and the next 24 48 hours.

CHRIS

3:04 Okay. Cool. And what we also do is we have a tool called recapped which is basically a collaboration tool where we can kind have whatever we don't get to discuss today. We can put the videos in there. We can put the recording in there so that Kat and Chris would have access to that. And then you guys can throw all your questions in there. And then we can answer the questions that we can through there and then schedule another call if we need to dive a little bit deeper.

WILL

3:32 Sounds good.

CHRIS

3:33 Awesome. Well, let's get into the good stuff then.

CHRIS

3:43 You should be able to see my screen. Yes. Alright. So the only thing that I will say is I've had like four shots of espresso this morning. So if I'm going too fast, just slow me down, Brett, keep me honest. And then we'll what I wanna do is kind of run through a couple of slides which would be some talking points about the company before we get into some actual product conversations. Okay? So a little bit about service trade were 10 years old. Now we have over a 1,000 Commercial contractors in North America... 30 percent panicle space, 60 percent of the fire life safety space, 10 percent miscellaneous being elevator inspection companies, a lot of medical companies that are... servicing the X Ray equipment type stuff. There's. A lot of them reporting. Now, it has to be done for that. I would say our mechanical businesses growing to X of what our fire life safety businesses. So probably in a year, those numbers will be flip flopped over 200 employees throughout the United States. And we are believers in best in breed applications. So.

WILL

4:55 One question, Chris, the 200 employees or most of those engineers, sales team, I'm curious. One of the things we think about like making sure the product is being reinvested in and is continuing to be developed et cetera. Yeah.

CHRIS

5:10 Yeah. I don't have the breakout specifically. I can get it for you. I think it's about 50 50 in terms of sales and support versus our Indian.

WILL

5:20 Nearing. Yup.

CHRIS

5:21 All right. So we have all account management team. We have a whole sales team. Obviously, we brought our... cold calling team, our BDR team in house instead of outsourcing. So now that's part of that team. And then we have a whole engineering department as well as that onboarding team as well. So I can get those breakout specifically, but I think it's about 55.

WILL

5:41 Okay. And then this may be on your about us. And I don't know this. Are you all owned by a larger company? Are you part of a group? Do you know what the, are you still like a founder owned tech company?

CHRIS

5:55 So we are back now by a private equity company called.

WILL

5:59 Yep.

CHRIS

6:00 We took around the funding of about 90,000,000 dollars couple of months ago.

WILL

6:07 Got it.

CHRIS

6:08 So to answer your RD question that's where a lot of those funds are going is back into the product?

WILL

6:14 Yeah. Got it. Perfect. Thank you.

GEOFF

6:22 So, you've been around since 20 10 or 2012, that's right? And you just got funding from GM. I was at a growth funding or is that the support operations?

CHRIS

6:39 The growth funding?

GEOFF

6:41 Okay. Okay.

WILL

6:45 And what, the reason we ask for is we, the one of the things that concerns us about smaller companies, I'm not thinking of when we're comparing it against like a dynamics or Salesforce or whatever is the company stability? So that's why we're asking stuff like this kind of gives us reassurance that we have partnered with companies before that basically did not have capital than not. We're not reinvesting in business and that has gone quarterly the questions too. But the answers you gave her get like that. This is reassuring. But that's where we're coming from on that. Yeah.

CHRIS

7:16 Yeah, majority that's going back into the company, right? So... you know, our clients right here's, a couple of examples were strictly in the mechanical space, Commercial industrial customer base. One of our big focuses on is on the recurring service aspect side of the business. And then folks that care about the customer experience, right? So, so you guys are trying to create a better customer experience for your customers... here's? Our mission statement. There's two things in here that I think are very important in the first one is Commercial service contractors, right?

--- *Type of work* ---

CHRIS

7:51 So our focus is on Commercial service contractors, right? People that are in the buildings, the strip, malls, the office buildings on a monthly quarterly, you will basis performing their PMS or inspections. And then the other piece in here is to make you guys more valuable to your customers, right?

--- *Customer engagement* ---

CHRIS

8:11 So what we call sticky, how can we help you guys become more sticky to your customers? And part of that is turning your service business into a customer service business, right? The other piece here is Amazon's change the way that people perceive purchasing buying things customer service, and kind of equipping you guys with the tools to give your customers and Amazon like experience.

CHRIS

8:38 How do we do that in route notifications, right? So hey, we're on our way, the customer will be here in a minute. Online engagement. There's a couple of different ways we do this. But one of our flagship workflows is quoting through service trade of capturing this deficiency loop with all of the pictures and video, and audio, everything that's broken. And we're going to run through some of that today and putting all that into a digital format that's engaging with your customer. Then can approve that quote online and tied to that quote into a job... service, like, right? So we call these maps marketing impressions per service, right?

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

CHRIS

9:15 How many times can we touch the customer digitally per service that's being performed? So once the work is all complete, we're now actually dug, we're going to go ahead and send out what we call a service link and we're going to go through this workflow today as well.

--- Customer engagement ---

CHRIS

9:27 And that's how customers will get there. All of the services that are done or their paperwork there's, their PM checklist, install checklist, whatever else that is... a customer portal, right? So giving the customer more, allowing some of your customers to log into your website, they would go to your website, log into a portal.

--- Invoicing ---

CHRIS

9:48 They could see all of the locations that they manage assets that they manage, deficiencies quotes, past jobs, upcoming jobs. If you choose to invoice out of service trade, they could also come in here and pay their invoice... and the invoice lake, right? So again, this is what an invoice link would be. And we're going to go through this too. So I don't wanna take too much thunder but tying that invoice link back to the service link as well as a pay now button. If you choose the invoice out of service trade or if you go back to the ERP?

--- Accounting integrations ---

GEOFF

10:18 You guys have connections with... service now? You know, we'll one of the, one of the main one.

WILL

10:27 Service channel, yeah, service channel that's the... some of the customer portals, things like that. We run across. Yeah. So.

CHRIS

10:38 Well, I think we talked briefly about this. Yes, we have some touch points with service channel, service channels incredibly difficult to deal with. So they're not the greatest touch points because service channel just load reply, but it is a focus on us to have more and more touch points with service channel curry go, I think is next on the list. And then there's one more one. There's a third one that I can't remember off the top of my head what it is.

--- Type of work ---

GEOFF

11:05 Said maybe said differently than how do we connect the service channel with your software? So we, I don't know what percent of your, of the orders or well it's probably. So if they have a lot.

WILL

11:16 Yeah. 75, probably Chris mcconaughey, 75, 90 percent of our stuff and a lot of our customers or even moving more stuff to service channel today.

--- Accounting integrations ---

WILL

11:25 That one of the companies we have to spend, we probably have four to eight full-time equivalent people that do nothing but hold data manually from our system to put it into service channel. One of our other companies has a system today that has actually, the other two have integrations already with service channel, which means they don't have to do that.

--- Pricing ---

WILL

11:46 So off the bat without service channel integration, you're probably looking at 400,000 dollars a year and additional costs just at one company before even include the other handful of companies.

CHRIS

12:00 Yeah... I can follow up with exactly the touch points. I don't know what the touch points are in the service.

--- Pricing ends ---

CHRIS

12:05 Turn off the top of my head. I can follow up... and show you where the touch points are with service channel. Okay. I have, I'll give you the scope of work as to what that looks like.

WILL

12:17 Right?

CHRIS

12:21 So we're going to manage all of your projects and services.

--- Type of work ---

CHRIS

12:24 So, you know, keeping close eyes on budgets, managing all of your change orders. Here's. Just an example of what a change order can look like, right? On your small projects, stuff, what we consider a small projects, stuff that's six months and less, right? So typically, the bigger stuff that's going to require some AI billing push, we push the pro core or a Sage product. It's your especially projects or installs or retrofits that we can handle inside of service trade. We're going to help manage the entire equipment life cycle from Installation, maintenance repair to the end of that piece of equipment is life cycle to, and also give you guys some performance ports on how we're doing surfacing that piece of equipment... I'm sure you guys have heard, but if not, we acquired a company called Northboundary.

--- Type of work ends ---

CHRIS

13:19 And what Northboundary does, the side of the Northboundary that's interesting for us was the CRM platform side of Northboundary. So I'm Vince doesn't really good job of building out some proposals on PMS of, you know, hey, we got a 20 ton rain rooftop unit here's.

--- Quote templates ---

CHRIS

13:39 All the stuff that we need for our quarterly PMS here's. All the items here's. What it's gonna cost you, right? Then you guys can put your margins on that as to how to quote that. And then there's some CRM functionality of tracking those quotes and following up on all those, that information.

--- Quote templates ends ---

WILL

13:53 Yeah, that's interesting because I did not know you all own Northboundary is used by at least one of our companies. I think... I wanna say Jackson mechanical use system so they do not use service trade. They use BuildOps, I think, right. Yeah.

CHRIS

14:11 Yeah. So I'm relatively new for us in terms of us acquiring that happened a couple of weeks ago. So there's gonna be some more stuff to come about with Northboundary. But the reasoning that we liked it is, you know, hey, we put our eyeballs underneath the hood. The architecture of the actual code was good and we really like the forward facing CRM platforms and the customer engagement side.

--- Parts management (inventory) ---

CHRIS

14:41 Just so you guys are aware, we also have a product called partsledger which is a whole inventory management system that's built on a ledger system that lives underneath the service trade. I don't think we're gonna get too much into this but that can handle all of inventory adjustments and Tory on the truck levels, warehouses, etcetera.

--- Accounting integrations ---

CHRIS

15:03 So the other thing that we also have is we use a WS, Amazon web services to host our platform. Amazon uses a tool called quick site which is just a BI tool where we're gonna take all of the data out of service trade and pump that into quick site to give you guys reporting on your KPI'S that you want to see.

--- Implementation and ongoing support ---

CHRIS

15:23 So whatever KPI'S you guys have, they, they'll get built out into a product called quick sites. So they're your KPI'S and then this also is live. So once that dashboard is built, you don't have to build it again and it'll be updating with all of the data throughout the day as things are progressing and changing.

--- Accounting integrations ---

WILL

15:43 Question on this one Chris... maybe just an architecture question. But is there, have you seen people set this up with PowerBI, Tableau et cetera. We have, we do a lot of stuff today. We just do it it's we basically, it's a bad process. We export flat files, put it in PowerBI, and then generate reports.

--- Implementation and ongoing support ---

WILL

16:02 So obviously, there's better ways to do that. Have you seen people set up those connections where you can do it live? Or do you all prevent that for some reason?

CHRIS

16:08 No, you guys can do that. So if you have your own BI tool, PowerBI is one Crystal reports is one... gosh. Dang man. I'm drawing a blank, but we put all the data into Redshift warehouse. And then like a PowerBI can pull the data from that Redshift warehouse.

WILL

16:25 Okay. Got it. Perfect. Okay.

CHRIS

16:29 Questions on the slides or any other talking points that we want to talk about on those things?

--- Implementation and ongoing support ends ---

WILL

16:37 No, I think that makes sense. I think what we found has been the most helpful is when we get into the demo and just walk them through kind of the life of a work quarter, you know, bring it in setting it up. The CRM stuff is bless interesting does right now because we do 98 percent national accounts like we typically get awarded thousands of blocks of stores and the time. So there's very little we have like two salespeople, right? So we have national account sales team. We don't really go in and are pitching individual stores and stuff like that. So the CRM stuff happens outside of it. So it's not like a one off store typically calling you it's usually you have, I think we've touched probably 50,000 stores in the last two years across all companies. But I mean again, you could spend a minute or two. I, but the life of the work quarter that's 98 percent of what we're probably interested in, okay, receiving the work quarter to invoicing.

CHRIS

17:35 Alright, that sounds good. And before we move any further guys, I forgot to make introductions. So I just started rambling, probably too much caffeine, like I said in the beginning, but my name's Chris Kidd. Well for Rob and Geoffrey that came in late. I run the sales for the entire east coast of service trade. Along with me for this Rod today we have Brett, he was my inside sales counterpart and he covers basically the northeast as an inside sales rep for service trade.

BRETT

18:07 How you guys doing?

WILL

18:09 It to me? And I can do intros real quick slide. My name is wild. I'm the president, Advanced climate solutions, which is one of our companies. And then I'm moving to a new role which is to be the CEO of Helios which is the collection of companies. Geoff. I'll let you introduce yourself.

GEOFF

18:26 Jacobson VP of finance. So I started about three months ago and I oversee all of Helios financials and accounting.

WILL

18:35 Hey, Rob and Dave, you guys wanna introduce yourselves as well?

ROB

18:41 Rob Starkey, director of client management for Advanced climate solutions. And thanks for having us.

DAVE

18:47 Some days it Caroline the dispatch make your team for Advanced client solutions to the dispatch board.

WILL

18:56 Awesome. Thanks guys.

CHRIS

19:00 Cool. Alright. Well, let's get into. So, so my, our conversations today here's how I was going to steer this meeting is I was going to handle the office conversations. So start from the office, talk about our data model, create, build out a work order, say you wanna work what it looks like.

--- Deficiencies ---

CHRIS

19:21 I'm gonna kick it over to Brett, show you the field piece of that, right? And let Brett talk a little bit to save my voice. And then Brett will close out a work order to, from the field, kick it back to the office. We'll click, finish those work orders out and go through that deficiency loop and quote as well.

--- Deficiencies ends ---

CHRIS

19:36 And then closes work orders out and get to an invoice status and then kind of go from there and see where it takes us from there. Does that sound all right, like a good plan? Sure.

WILL

19:45 Yeah.

GEOFF

19:46 And just so you know, Chris, I'm guessing, well, I mean, we give this background, we are doing a full ERP selection process right now. And so we are heavily in the mix. Your name, this came up a few times. So it's potentially a one shot deal. Would love to talk about pricing at the end too and real pricing not like the pricing you would receive if we were to select you.

CHRIS

20:11 Okay.

--- Pricing ---

GEOFF

20:12 Yeah. We have an issue with Salesforce. So they gave us one price upfront. It's easy to disqualify them. You know, they weren't even really get a chance. And then he came back later and they gave us two thirds Ish off on pricing, so.

WILL

20:26 Yeah, you.

GEOFF

20:27 Know it's not really, you know, and it's full disclosure. I guess where we're coming from?

--- Pricing ends ---

WILL

20:34 Yeah, because we're basically at the end of the selection process, you guys came up several times. I told you and so we're we've obviously the reason you off come up. So we want to see the product but we also want to be transparent about this isn't probably like back and forth over the next four weeks type thing.

--- Pricing ---

CHRIS

20:49 I'm good with that.

WILL

20:51 Well, I want to get something signed the next two weeks to knowing how most of commission plans work in the United States.

CHRIS

20:58 Yes, yes, we can leave it at that. Yes, yeah.

WILL

21:05 On the same boat.

CHRIS

21:08 I had you guys at 175 licenses, if we, I mean, we're jumping the gun a little bit. We haven't talked product, but when I kick it over to Brad, I can do some stuff on my side to make sure that we expedite this conversation. Is that fair? Well, 175 licenses office an admin or free. It's just field users?

WILL

21:25 Yeah, that's correct. So, it's 175 just as a CS, which is next year again, assuming we don't growing, which we will. So the first initial buyer would be 175. And then the other two companies would follow suit at the end of next year, which is probably twice that. So you're probably looking at, I think we're at.

GEOFF

21:44 Knows 350.

WILL

21:46 350 by the end of next year, and then that's not again, my candidly Chris, my guess over the next couple of years, that number will probably be as you've seen other companies grow closer to CMS et cetera. Is probably in the thousands. So we would like to see what pricing looks like at that scale. We wouldn't be there next year, but we would like to know what pricing looks like at 1,002 1,000, that's probably enough. I don't know that we need the 3,000 pricing, but.

CHRIS

22:13 Okay.

WILL

22:14 And I agree. Yeah, we can talk that the end after we get through the product stuff.

--- *Pricing ends* ---

CHRIS

22:18 Yeah, I just, I don't want to pull a Salesforce on you, right? So.

WILL

22:22 Yeah.

CHRIS

22:25 Yeah, I, you know, and hey, just on the transparency side, I may need some time, you know, an hour to get these numbers right? So we might not get into too deep, but I can put that together if our conversation goes well today. So let's get into it and go well. We'll get aggressive and try to forgot to get this thing going by the.

GEOFF

22:44 We'll we'll tell you mean fly out. What are I'll say one of our walkaways are, you know, like the service channel integration that's a pretty significant cost for us.

WILL

22:55 Yeah.

GEOFF

22:56 And just costs and speed.

CHRIS

23:01 Yeah. So let me, I will have the touch points on that. I know that it's in beta and it's actually now I think it's live. So... we have that live. I just gotta get you the touch points that I don't know where they are and what the triggers are.

GEOFF

23:15 Okay.

WILL

23:15 Yes, sir.

CHRIS

23:17 So when you log into service trade, this is typically the first screen that everybody sees. We can filter this out by the different offices. We can filter it out by different job types as well as service lines are the type of work that we're doing. And really, that's just another filter functionality for some reporting stuff. Have I only want to see my boy, their work? I only wanna see profitability on boiler stuff or eight track stuff or whatever that is. And obviously this is a demo account. So you wouldn't have that many service lines.

WILL

23:48 Yeah.

CHRIS

23:48 You know, also filter that out by job owners. This is just a quick snippet as to kind of what's going on technicians clocking in and out, all of their recent clock events, a daily schedule... any overdo jobs that appointments, right? So we're going to capture all of those opportunities for you guys to continue to drive that revenue here's. All of our upcoming PMS that or do within the next two weeks that we have not scheduled yet?

ROB

24:15 Hey, Chris, can this be broken down by regions as well to, instead of just having everything correct? Okay?

CHRIS

24:23 Jobs that point is doing the next two weeks, right? So, all of my upcoming PMS that we don't want you guys to miss. We're big believers on capitalizing on those at opportunities to service or customer... pass jobs we mark completed, right?

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

CHRIS

24:37 So essentially workflow there is technician, does what he's supposed to do. Once he says he's done office comes back and puts eyeballs on that specific work order. And we use the terminology of jobs and work orders, the same rights with job, is a work order... technicians.

--- *Invoicing* ---

CHRIS

24:53 Done, somebody from the office is going to review it and make sure that it's right before we actually push it down to the bucket of completed jobs to be invoiced. And again, at that point, we start to pull our hands out of the equation. If you want to invoice out of the accounting system. Great. If you wanna invoice out of service trade, great. Let me grab an, and page.

--- *Accounting integrations* ---

WILL

25:12 I'm curious, Chris, what do you see most of your larger companies do? Are they invoicing out of like Sage and dr, they using your system? What do you typically see?

CHRIS

25:19 More and more invoicing out of service trade. Interesting. And I think the point there was two years ago, hey, we always fall.

--- *Invoicing* ---

CHRIS

25:29 Invoicing should be an accounting function. We always push that back to the accounting side our teeth and now, and they wanted more functionality from the invoice side, which caused us to create, you know, more dynamic invoicing out service trade with that whole pay now button tracking history from the, on the invoicing. So we're seeing more and more customers invoice out of service trade.

--- *Accounting integrations* ---

WILL

25:50 Yeah. Do you see... I mean Sage intacct is the one that is probably most interesting to us and we use quick assist you to Quickbooks today, but that we plan to move away from that. What are some of the like, I mean, is that what you see, what do you see Sage intacct?

--- *Accounting integrations ends* ---

WILL

26:07 Is that something you see many like five percent of your customers are on something like that is at 100? Can you give me an idea of how many Sage intacct, you know, how common that is? I know it's an integration you guys list on your website?

CHRIS

26:19 Yeah. I would probably say we have over 50 customers on the impact side, maybe seven. Let me over 75 customers. On the text side, Brett might be able to look.

BRETT

26:31 I just message Tanya. I'll double check for you guys. Yeah.

CHRIS

26:36 We're we're seeing more and more impact. We love in tact, think it's a great product. We're working with a bunch of in, on the tax side. So, right? That's the reality that situation. And Sage is the big bear in this market for a lot of the ERP accounting stuff. They're putting all their R and D and impact and we're hitting our wagon to that train.

--- *Recurring maintenance* ---

WILL

26:55 Yup. Yup. Okay. So.

CHRIS

27:02 On a... location page and this is going to be the data model conversation. A couple of pieces here that I think are going to be pertinent to you guys is what we call services. These are all of the things that were obligated to perform at a specific location, whether it be a quote or our PM scheduling aspect, right? So quarterly, semi, annual PMS. And this is where you guys would build these out in service trade. So if you were out here to do work on the boiler, our service want line is obviously gonna be hot water. Our contract is going to handle all of our market rules.

--- *Quote templates* ---

CHRIS

27:39 So whether you have somebody on under contract and when that contract would expire et cetera. We have the concept of templates for these as well, right? So I'll talk some more when we get to the quote. But the concept of templates, boilerplate templates that you guys will build out in service trade... here's, the description of everything, what we're supposed to do.

--- *Recurring maintenance* ---

CHRIS

27:58 We have the concept of putting preferred text on a specific. It was like this for example. So, you know, Chris Kidd, well, handles all stuff at capital one arena. So I'm gonna put Chris on that estimated price. It's 520 bucks. We think it's a two hour PM, our scheduling window. How long we have to get this done whole month. We can make a custom specific scheduling windows single day. How often should this occur? Right? A monthly and let's repeat every three months is going to be a quarterly PM.

And then these are all of the things that we need to perform for this specific PM. So these are going to be all of our consumable... belts, filters et cetera.

CHRIS

28:43 We have the concept of recurring invoices, so that's the capability to invoice without a, any services actually being rendered at a specific location.

--- Assets ---

CHRIS

28:54 So if you guys are building out your PMS before you even service your customer, you can do that... here's. All of our jobs, right? So we're going to track all of the jobs at a specific location, right? And all of these are hyperlinks directly to that specific work order. What you're going to get to in a second... assets, we're going to track all of your guys assets that you're actually working out on the field on, right? And... a full history of all of those pieces of equipment to right? So we are going to know all of our services that are tied back to that piece of equipment. So whether we have them under quarterly PMS, semi annual PMS, whatever that is, every job that's ever been performed for that specific piece of equipment, will track against that piece of equipment. Any deficiencies that I've ever been found deficiency is what we call pull through revenue, pull through work. Any quotes associated with that piece of equipment. We have the concept of parent child assets... and then any attachments that needs to be associated with that specific piece of equipment. So wiring diagram, piping diagram, install manual, tech manual. You can add to a specific piece of equipment... will also track the deficiencies at a location page as well. The quotes obviously again at a location page as well. Our contracts is going to tell us what we have under contract for this specific customer. Any comments at a specific location. So comments can be a scheduling note that could be specifically technician note. You can have them internal comments or external comments... and then any location attachments as well. So have a picture of the building, a picture, you know, site plans, whatever that needs to be for a specific location. So what I did is I just went ahead and click add a job and I grabbed a couple of services and I pre-built one out for some time purposes.

--- Tech On-site ---

CHRIS

30:48 I'll show you there's a couple of different ways we can schedule this. But I'm gonna kick it over to Brett. So you stop hearing my voice for minute and let Brett show you guys what a digital, what the field will see closing out that work order.

BRETT

31:02 All right. You guys seen that?

--- Access to information ---

GEOFF

31:06 Yes.

BRETT

31:07 Yes, cool. So service trade is compatible with either iOS or android devices, phone or tablet, whatever you guys pick. But I'm on an iPad today. This is my mobile app. We can see the jobs that are filtered by today. If I turn that off, I'm gonna see every job that I'm scheduled as a technician.

--- Tech On-site ---

BRETT

31:23 I keep that on just to keep it a little cleaner. But here's that capital one job Chris scheduled for us. So the first thing with it technician might come in and clock in and route, he might notify the customer that he's on the way simply by clicking that button, send an email with the. But from there, once your tech is on site, you simply going to clock out event out, clock in on site that's going to track as ours in the background. Really nothing more he has to do there under services is what he's actually doing on site. So Chris setup two services for us, one on the chiller, one on the hot water heater, you guys can set up what your technician sees here.

--- Deficiencies ---

BRETT

32:02 Everything's permission based. You guys kinda pick and choose how much information he gets in the field... under that. We've got attachments. So a lot of times our customers are taking a lot of pictures, videos, audio recordings. What they're doing is they're telling the story to both the back office and the customer as far as what they did on site. So you guys can add as much information as you need here.

--- Deficiencies ends ---

WILL

32:24 Any limitations, bread on the number? I think we have some job sites we had of attaching 8,100 photos, any limitations on stuff like that?

BRETT

32:34 That shouldn't be a problem.

BRETT

32:41 Below that, we've got job items, so job items or just the material and labor that you guys use on site.

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

BRETT

32:47 Chris already built out some items on the ticket from the office. That's why we're seeing stuff on here. But as I come in here, if I am a tech, whether I pull something off my truck, I get something from the vendor, whatever it is. I can add that in to make sure you guys Bill for it. So it's just a matter of your guys part lists being inside of service trade. And if I come in and say, you know, I used a widget on this job, say he's four of them, I can come in and add it to the work order. And as we can see, it's gonna be right down below and it's going to be reflected back in the office.

--- Assets ---

BRETT

33:21 How Chris was talking about assets from the office showing you kind of how we track the service history behind them. Technicians have that visibility in the field under assets. So let's look at that chiller today. When I click on that chiller here's, all the information we know about this piece of equipment.

--- Access to information ---

BRETT

33:37 If something's wrong, your technician needs to add information. You can do that by simply hit edit and iOS phones or tablets actually have a really cool like OCR capability where they can just scan the name plate and pull it in here. So they don't have to type it in the native function.

--- Access to information ends ---

BRETT

33:52 I've got a lot of customers using that one today... put on here as well. They do have access to full service history. So really just trying to reduce any calls to be the sand. Hey, what happened to your last time? So they can come in and say there's been two work orders done here. Let's see what the last one was. I can see what technician was out your last time. So it looks like it was Matt and Chris. What did they do on site? Same services we're doing today. If they did take any pictures, how it says five here, this would be your 80 or 100 pictures that you guys took last time.

--- Assets ---

BRETT

34:22 So there's PM checklist pictures, all that good stuff. And then also on this page, you do have a list of every deficiency found on this specific piece of equipment. So really just trying to arm your technician with all this information, I was fingertips. So he's not reaching out to you guys in the office makes sense?

--- Forms ---

WILL

34:42 Cool.

BRETT

34:45 From there, I would imagine all your companies are filling out some sort of checklist for the PMS you guys do.

WILL

34:51 We do. Yeah, it depends. Some of us use like smart sheets. It's a separate link. Some of them are built into the system itself. But yes.

BRETT

35:00 Okay. So we'll build or we did build that right into the system. Basically what we do is come down here to view more details. Does exactly that just shows me a little bit more information from there. Your technician can come up to actions and hit download blank paperwork. And how this works is I only have one form into here today because this form is specific to the service that was set up, but we're gonna pull your guys forums. It's a service trade instead of dispatch real estate that's chiller job. You could chiller form, H, fact job at the H back form. So your technician would take this form, simply generate it. What we do is we open it up through Adobe acrobat, which is a free app just enables us to smart fill these forms on site. So if I take that, basically what I mean by smart fill is this form already fills out because your technician shouldn't be pencil whipping this stuff in the field. So all my job information's here, I asked that information is right there. And then like I said, your guys form. So whether it's checking off the boxes like so or it is writing and free form information, your text are just gonna fill it out as they see fit. Any questions on this one?

WILL

36:03 That makes sense.

BRETT

36:04 Perfect. Once they're done, all they gotta do is add this back to the service trade job.

--- Tech On-site ---

BRETT

36:09 So we'll simply send a copy and add to service trade. But because I am clocked in at this location, we know exactly where to put it on this job at capital one. So we're going to simply upload it and we are good to go. And then that paperwork that we just upload is going to be here under both attachments as well as paperwork. So if I opened that up, it's right at the top for us. And that's also in the office.

--- Access to information ---

CHRIS

36:32 Just one note there. Brett, open attachments. Again, multiple technicians on a work order doing multiple different things. So you can see, I, I'm adding pictures, Brett, adding pictures and it's not gonna do it. That won't affect the system.

WILL

36:45 Got it.

CHRIS

36:46 The question will, once the technician clocks into the app, it's a native app on their device, everything is cached. So they can go do whatever it is that they're supposed to do… right? So if they're down in a boardroom and they don't have service, they can go ahead and add these pictures. They can add whatever parts in widgets that they use. They'll get have access to all of this stuff because it's cash natively on the app. And then when they come back out of the basement, everything will push back up into the.

--- *Customer engagement* ---

WILL

37:13 Cool.

BRETT

37:14 Thank you, Chris. From there in the mobile app, one of the one of the things we really pretty Shawn is allowing your technician to track and log the deficiencies, they find that the fields that you guys can maximize on the pull through revenue on that. So let's make it easy for those text to find that stuff right here.

--- *Deficiencies* ---

BRETT

37:28 Under deficiencies here's, everything in the past, but I can simply come in and added efficiency. If we say we have a broken compressor today, I don't have to be crazy descriptive on that because I am gonna come behind it and add more detail. What I mean by that is let's take those pictures, those videos, audio recordings of showing the office what they're actually going to quote out. Our customers really like the audio recording because text don't wanna type stuff down to waste of time so they can come in here and say, hey, well, I got a broken compressor here on this rooftop unit. Need XYZ to fix it. It's gonna take me about two hours. They can really go into detail with it. There. From there, your technician simply marks in the severity of the deficiency. We'll call it deficient today and then ties it back to the piece of equipment in which they're working on giving you that really read the service history off the bat service trade. Gonna select the service line for you guys. If you're tech needs to change it, you can. And then we're just gonna mark the status of this deficiency, whether it's new fixed or verified by the customer. So I'm gonna call this new. So Chris can quartered out from the field. If your technician does have a proposed solution, he can enter that here. If not, you can leave it blank and leave it to the office. Any questions on tracking, logging? Deficient?

WILL

38:46 Makes sense?

BRETT

38:47 Perfect. The last thing here is guys, are you getting your work signed off on before you leave location?

--- Forms ---

WILL

38:53 A lot of them, yes, it depends on the customer, but yeah, they typically there's a signature or something require.

BRETT

38:58 Okay. Two ways that can be done on the blank paperwork. You guys saw, you can have a signature field in there if it is a customer specific form or you can use service trade to built in capability called work acknowledgement.

--- Tech On-site ---

BRETT

39:10 So basically what I do is as a tech, I would select my onsite contact. Well, let's say that to you as the tax. I'm coming through all these fields right here, making sure everything I wrote down in my app is correct. If you don't want your text to generate the invoice on site, we'll turn that all permission based setting. They won't even see it from there. Your tech is gonna hit review at the top. I'm gonna turn this around them onsite contacts to, well, you're gonna come in here, review this, go through these fields, agree with your guy's t's and c's simply acknowledge it. I'll make sure your information is correct. I'm gonna send you an email. So you get a copy. Last step is we would get that signature from you and we're pretty much done with that job. So as far as closing the job out, all I gotta do his clock out. It's gonna say, hey, what did you finish? I'm gonna say I finished both. And then are you done with this visit? If I hit, yes, that means yes, go and build it. If I hit, no, that means maybe I'm going on lunch. Maybe I gotta run to the vendor. I'm not done with this job yet and I'm coming back... and that's pretty much the mobile app guys. What questions do you have?

--- Parts management (inventory) ---

WILL

40:14 One instance we run across just how would we handle the technician shows up? Needs to go to a supply house, pickup apart because they don't have it there. How would they, what do you see customers typically do to handle that scenario? So it's not something that they had a truck stock.

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

WILL

40:28 They're going to go to a local spy out by widget, capture the receipt, some way. What have you seen customers do it though?

BRETT

40:36 Yeah. So I think there's couple of ways to do that. They can always just take a picture of the receipt applied to the work order.

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

BRETT

40:41 So it does come back to the office. But I think the big question. Well, as are you guys, you know, generating po is in today's world. Is that something you're looking to do?

WILL

40:49 Yes, we, it's different at different companies. We are consolidating combining the processes moving forward. We're not gonna have three different, you know, things deployed across different companies today. Yes, no, we take a picture of it and we send it to the dispatcher who approves it. Then they do expense reporting. And in the month the other companies correct, I'm Rob, Geoff, MS and POS do generate pose for the text in the field. Is that fair? Yeah?

--- Access to information ---

BRETT

41:18 So, I would say that to kinda keep that process more standardized across the board, you probably want to get to a level where every company's run an, right?

WILL

41:26 Icon?

BRETT

41:28 So, yeah, let's just jump back in the mobile app. Basically, as Chris touched on the slides, we do have another application it's called partsledger.

--- Parts management (inventory) ---

BRETT

41:35 It's our po, processing an inventory management solution. So, if I come down here to job items, you saw this open partsledger button.

WILL

41:43 So...

BRETT

41:44 We would click that. And essentially, what happens here is it pulls up this other page where texts can do a couple of things. They can run a stock lookup. So if they need to before they go to that vendor, see, hey, do I have this site glass? They can look it up and says, hey, I've got one on this truck bunch at the warehouse and six on this truck. If it's not on their truck, they can make a transfer down below that's just making a log of the moving parts.

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

BRETT

42:09 But to your point, well, if they do need to run to the vendor, basically, we would just go generate new po. And when I hit this little I button right here, what it does is essentially pulls over job information from the job. So I don't have to jump back to my work quarter, yeah, refresh that.

BRETT

42:28 See here.

CHRIS

42:31 And what that's essentially doing is... the technician is not, the technician is essentially creating a po, but it goes into a draft status at that point and it lives in draft status. So he's not actually generating a po per SE. And then the office then would actually would click a button that would actually generate the po.

--- Parts management (inventory) ---

CHRIS

42:49 So technicians are going to put a bunch of stuff in there. And this is part of the ledger system aspect side of things where they're going to say, hey, I need filters and belts and blah, blah, blah, right? And this is all that stuff that I need to go complete my job.

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

CHRIS

43:00 We're still gonna let the tech go do what they need to do to finish completing their job in the office would actually generate the po.

WILL

43:08 Got it. So the office is still proving something and then, yeah, yeah.

CHRIS

43:12 There's some control there back from the back office that's what I'm pretty much all of our customers want. There's a very select few that allow the technicians to generate their pose. Typically that's a back office control functionality.

WILL

43:27 Yep.

BRETT

43:30 Great. So basically, I hit that, I just had to get into the right account. So I hit that, I pulled up my job information. I'm gonna say that, hey, these are the two parts that I need to order. Basically your text comes in and puts the vendor he's ordering them from. And you guys to let your list select your list of vendors so he can't go to a vendor that you don't purchase from. But we're simply going to create that po... and it brings us to this page right here where your technician can let you know why are we ordering this part... had some on truck? But they're broken. And then from here, you guys actually put in what you're ordering. I selected these two parts from the other page. So they already pulled on here. But if we do need to create another item or add an thing item from this job, I would simply go right here to select it. And then all we're gonna do is finalize this po. And what's going to happen to Christmas point is this is us generating the po request to the office, making a log that we need a part office would be in charge of actually receiving it and doing all that.

--- Deficiencies ---

BRETT

44:32 But there's that po number right there. If I do need to email this to anyone, I notifications going to go out any way. If I need to notify someone additional, I can put their email here. Can also take a picture. Maybe I'd take a picture of that broken part to show you why I'm replacing it.

--- Deficiencies ends ---

BRETT

44:47 So it's simply it down there. And the rest would be covered from the office. Do we want to jump into partsledger in the office now? Do we want to hold off on that? What do we think? But?

CHRIS

44:57 Let's hold off. Let's try to on that specific conversation right now. I think let's keep marching forward and see where it goes.

--- Tech On-site ---

BRETT

45:08 And then off to you.

CHRIS

45:11 So now that we're done out in the field... I'm gonna come back to my office view and you can see now this is that work order out a capital one arena. We're technically completed, right? You can see that the technician completed what he was supposed to do. We're still in Progress. Okay? Because the office needs to review this and actually complete the job. So, I'm gonna come down here and make sure that Brett did everything that he was supposed to do... right? I can come in here and say, hey, he had to use a widget here that was supposed to go on that Eric loyal so I can drag and drop it down to that specific service, right?

--- Tech On-site ends ---

CHRIS

45:46 And I can say, you know, hey, we're refrigeration is now we need charge 90 dollars, not 32. We'll flag it as people start to change standard cost you guys have in service trade. But all that looks good. As I continue to scroll down, we're going to track clock events.

--- Tech On-site ---

CHRIS

46:03 So as technicians are clocking in and clocking out of the job will flag also flag if that too far away... the pieces of equipment that we're supposed to be working on for this specific work order going to be tied to this as well here's. Our deficiency. I'm gonna open up this in a new tab.

--- Assets ---

CHRIS

46:20 We're going to get to this deficiency here in a second. That's an important piece to this invoices is blank. We haven't gotten to that yet. Here's, our comments, right? Don't send Chris. They don't like him. And then our attachments here's my PM checklist installed checklist before after pictures, the social media engagement aspect side of things, all those attachments would be there.

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

CHRIS

46:42 So now that looks good. What I'm gonna do is go ahead and complete this job. And one of two workflow workflows happened. I can immediately create the invoice. But what I wanna do is go back to what we call those maps, the marketing impressions per service. I'm going to go ahead and send out a service link, right? I can pick and choose what I want to show to the customer, right? So I can come down here and say, hey, I'm gonna turn this audio on this deficiency off. But what I'm gonna do, let me get rid of you guys... is I'm going to send this out to some of you guys?

CHRIS

47:18 And so you guys are going to get a service link here and you can forward that along if you need to click the wrong person to, well... let me send that to you. Will.

CHRIS

47:30 Anyway, you guys are going to get a service link here and your inbox, I'll let you take a look at that just as you guys see fit. But the next thing that we do is we're going to go ahead and invoice this job at this standpoint, right? And this looks good. So I'm gonna go ahead and create this invoice if you choose to invoice out of service trade, right? Hey, we're going to track all of your margins for all of your, you know, financial aspects side of things. But this is what an invoice page is gonna look like, right? And so now I can come down here and see gross margins. I can see everything that we did. I can then send it to an accounting system, right? So if this standpoint you wanted to send to in tact, there would be a button right there that says send in tack.

--- Invoicing ---

CHRIS

48:09 We also have the capability to bulk send invoices into Intacct as well. So you can run a report of show me all the stuff that we did today. Okay? Now, I'm ready to send these things the invoice. But what I wanna do is send out an invoice link and I'm not actually going to send you guys an invoice.

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

CHRIS

48:25 I'll just pull up a full screen preview. And so here's what an invoice link looks like. You can dictate how you want the customer to see this, right? So if you wanted to break that out just to Tina line total, only you wanna break it out by the different parts, multiple ways you can get this invoice out to the customer. But the cool thing here is that service link that I just sent you that's in your inbox. Now, this link will take them directly to that, right? So now this is in your inbox, you know, what that invoice is tied to... here's. All my files and photos, my checklist and everything else et cetera.

--- Invoicing ---

CHRIS

48:57 I know by the way here's, this deficiency that we found that we're going to get to in a second quote out. Customers also have a pay now button where they can pay with a credit card or pay with AC. H.

CHRIS

49:11 So that's essentially a cycle of the work order.

--- Deficiencies ---

CHRIS

49:14 What I wanna move to next is the deficiency that was captured, right? So this is what we're really big on in terms of some pull through revenue. So here's where I'm going to go to a deficiency page and you guys will get notifications of all these deficiencies and you can set up who gets what notifications.

--- Quoting ---

CHRIS

49:30 So the point they're being as deficiencies are flying in, someone's going to get email notifications, whoever that is, slack channel notifications. Whatever you guys choose to do, where do you want those deficiencies to end up? But what I'm gonna do is go ahead and create a quote. So expiration date of 12 30... and here's what a quote page is gonna look like.

--- Quote templates ---

CHRIS

49:52 So, I'm going to have all my attachments. I've got my audio. So I know what I need to do to get this thing quoted out. What I'm gonna do is throw a template up and we had talked, I talked briefly about templates. We have this concept of templates for job services, quotes, right? Is your typical verbiage, this is all your guys. Excuse me, verbiage here's. Typically what we do for compressor swap out. I'm gonna go ahead and add these items to it. Okay? I can come in here and change whatever I need to change.

--- ST app contracts and pricing ---

CHRIS

50:22 For some reason. Our cost isn't there. So I can say, hey, that should have been 99 dollars. You can see my market rules will automatically get applied. I can choose how we show this to the customer, right? If it's Tina, I'm it's grand total only if I want a line item, type it out, right?

--- Quote templates ---

CHRIS

50:37 Same as the invoice... that's typically, how quote template will work. I can also come in here and say, you know, hey, special compressor... vote on our HP AC service line costs us 5,000 bucks. I'm gonna charge customer 10,000 dollars. I just go ahead and click save. Now. That looks right? Was there a question?

--- Accounting ---

WILL

51:02 Yeah, real quick question. And maybe this is, it's not relevant if you do the invoicing and service should be, don't do it in service trade, but how do you all handle, you have an integration with apple era or something like that when it comes to taxes and all that?

--- Accounting ends ---

CHRIS

51:15 Correct.

WILL

51:16 Okay. Yeah.

GEOFF

51:22 Hey, guys. Did I miss? Is there a way where you can see the whole history of this ticket?

CHRIS

51:29 And what do you wouldn't Bill say history? You mean just.

GEOFF

51:33 Like who's reading it? So, you know, in the audit trail on who's doing what... my suspect. I'm not this close. This stuff. I assume there's a lot of hands touching this.

--- *Dispatch* ---

WILL

51:45 Yeah, it's an important that's a good one.

CHRIS

51:48 So I can see who the invoice was created. If I go back to the job whereas the job... will track a full history, right? So I can see job was created. Chris cable was the salesperson assigned to it. Whoever this person is assigned, Chris, Kidd.

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

CHRIS

52:05 Well, looks like Chris K and Brett were assigned to that appointment. Brett added some pictures. Chris added some pictures. Some services were updated, appointment was changed, blah blah blah, you can see that will view the service link for the job as well, right? So we'll track your customers engagement as well. So you'll know what your customers are doing.

GEOFF

52:27 Awesome.

CHRIS

52:29 So, kind of on that note, will I'm going to send this quote to you? And let me, Geoff, I'll send it to you sure to clean up some of these contacts. Chris. I'll send that to you and I'm going to turn the audio off and are actually already turn the audio off.

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

CHRIS

52:44 I'm gonna send that to you guys. And if you have access to your email, you may have to refresh your email, but down you'll see that aardvark service, which is our demo account, right? Are fake mechanical contracting company. You'll see that quote come to your inbox down at the bottom.

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

CHRIS

53:01 It'll be a view and respect to quote. And if you click an open that, it'll bring you to this page... right? The description work again is going to be your guys description here's. My files and photos. If we had a bunch of pictures and video and audio and stuff like that would be there here's. My materials, parts, et cetera. My grand total. And then here's my t's and c's... and if anybody does have that quote, can you just go ahead and click approve because we're going to track a full history, Geoff to your point, a full history on the quote as well?

--- Quoting ---

GEOFF

53:37 Yeah.

WILL

53:38 Yeah, I think I just...

CHRIS

53:40 Awesome. So I'll just refresh for time purposes. But yeah, you can see now that status has been changed again, the history we're going to track pictures added drive, the quotes been drafted. I see, well viewed that quote will approve that quote with po number, blah, blah, blah. And we'll also track is IP address. You'll also set that up so that you guys can get notifications as to when I was looking at the quote. When the quote got approved... from here, I can go ahead and create a job from that quote or I can add it to an existing job.

--- Tech On-site ---

CHRIS

54:13 So if I know that we got to be act back out there for a PM in a month, I can go ahead and add that to that job.

CHRIS

54:23 And now that's essentially it's just created a work order?

--- Deficiencies ---

CHRIS

54:34 To quick search functions real quick on the deficiencies, right? So again, really big on driving revenue. We're going to track all the deficiencies that are being captured, right? So we want the technicians to capture as many deficiencies as possible. And then we can give you guys some reporting functionality of show me all the deficiencies found this month... right? So here's the status here's. All deficiencies found this month. Here's. Everything that we have or check the status to as well, right? So if the technician just fix it, if it's out for quote, right? Just show me all new deficiencies. If somebody's job is to come in here and take a look at all these deficiencies and figure out how to turn them in the quotes... right?

--- Quoting ---

CHRIS

55:12 So we'll track all of those things being captured back out in the field and let you guys act upon them as you see fit. The next piece here is we'll track all of the quotes as well, right? So show me all my quotes that have been submitted and viewed but not approved, right? So that here's everything that the customers taking a look at but chosen not to approve. We can also bulk, send those back out to the customer... right? So end of the month, let's go ahead and take a look at all these quotes and let's box, send those back to the customer. Finally, I want to see, you know, quotes at chick fillet or capital, wanna Rena, whatever that is, right? If I only wanna see quotes for Abbott office, I can see all those search parameters as well. Any questions on the kind of the deficiency and quoting loop side of things?

--- Customer engagement ---

CHRIS

56:05 Is that checking the box for what you guys were looking for in terms, a lot of the turn and burn quotes?

ROB

56:13 Expected with the quotes is that we still have to put them into our customers portals. So even though we can email them out through this, I mean we still have to put it into the portal. So I don't know if that.

--- Customer engagement ends ---

WILL

56:24 Yeah, yeah, that's a good point. Rob, what I was gonna say, Chris, yes, I think it does that. But to robs point, we end up and this is where the integration stuff matters so much is because we basically create her own quotes and then we have to go into their system. And if there's not an integration, then we end up manually inputting it into their system. Not just the PDF. Sometimes it is as simple as a PDF but quite often correct if I'm wrong, Rob, like it's individual line items we have to put into their system.

ROB

56:50 It is the individual item from it.

WILL

56:51 Yeah. And so we end up recreating it into their system without an integration. And so it ends up it just excellent. We have an entire team dedicated. We have, how many people we have on the client management team, Rob just say CS 20 now probably.

ROB

57:07 Yeah.

WILL

57:08 We have 20 people at, because they see us, doesn't uses the system that doesn't have an integration. We have 20 full time employees that do nothing but split what's your data basically from our system into the other customers portals, largely service channel and few others that's why it to Geoff point earlier, there's an enormous amount of lost opportunity but not have an integration. So, I think, I know we're gonna talk prices up after this, but like that's the stuff that comes to mind for us. We do the ROI is, you know, going with the system that doesn't have the integrations are, that are proven out just ends up being you're talking hundreds and hundreds of thousands of dollars a year, more expensive. But yes to say that, Chris. Yes, there's nothing new. You guys don't have it's. Just, I know that's outside of your control but just want to be transparent about him.

CHRIS

57:53 Yeah, no. And... I think the next conversation should be getting our CEO on the phone to discuss the service channel integration in the current status of that and where that all lives in stance. I was going to get into the dispatch board, will we are at? We, I think we block an hour and a half.

--- Purchase decision ---

CHRIS

58:12 We are at an hour. I also do kinda want to flip it around to you guys a little bit. How much you a little bit?

WILL

58:22 Yeah. I would spend some time on the dispatch board especially with Dave on the call. That way I want it. I would love data input on as if somebody is probably seen like dozens of these things at this point.

--- Dispatch ---

WILL

58:34 I can just walk to the dispatch board a little bit and we can leave some time to, at the end for questions or I, I'm also available most of the day, Christopher, we want to follow up with a call.

CHRIS

58:42 Okay. Yeah, we can do that. So let's poke around the dispatch board for a couple of minutes here. So here's our dispatch board, we can filter that out by the different offices, right? So you guys would track that through your different offices, right? And... another thing, we have the concept of roles in service trade and permissions in service trade. So, what that means is scheduling dispatching, admin roles, quoting roles, deficiency roles, right? So, so certain people will have permissions around the system. So... we'll have, that will break this out by the different offices up here in the top right corner. I'm gonna have available jobs. I can filter this out by the different jobs by my different offices. Okay? I can say, hey, all my service calls, PMS, whatever the different jobs are. I can see all my different job types, right? I can say, hey, would show me all my retro fit jobs too, right? And then this is all going to be what I call kind of dynamic meaning this is all drag and drop. So I can see that, hey, Angela got nothing to do this afternoon. I can go ahead and give him a PM at 80 testing location or he's gotta go do this party hospital in Pittsburgh or it looks like bends got nothing to do. And that's all drag and drop based off available jobs... will also come in here. And this is where we can kind of live with the, you know, hey, I can say capital one arenas calling us again. We'll know our primary contact because we will have that prefilled. I can say, hey, this is going to be an emergency service call, whatever that is... scheduling. We're going to get to them same day. It's 12 o'clock hi, I'm going to get to you guys by two. They're saying no heat. All right. If there's no heat is probably on the boiler unit. You don't have to go and fix... not to see seven or 50 dollars, whatever that is... gonna click save where that pops is into the unassigned bucket, right? So this is basically a catch all bucket of which now I can come down here and take a look and it looks like Chris is going to be free at two o'clock so I'm going to get to that, give him that job at two o'clock and let's say that's going to be a two hour job, not a one hour job. So that's essentially kinds of a reactive emergency service call, set that up. And then that will populate onto the technicians tablet like Brett showed you and he would go through his work order like, we...

DAVE

1:01:13 Yeah. Are you able to customize the different sites... got different color codes... or they preset? Are they something that?

CHRIS

1:01:27 Now, the color codes, a preset?

DAVE

1:01:39 I like the ease of entering a work order that seems pretty quick. I do like.

CHRIS

1:01:48 These are your, you know, I kinda call them your turn and burns, right? So, something like boom, I gotta get somebody that they're quick. Let you see who can get their, each technician with their own swim Lane as you're starting to build out a lot of that, their schedules out. We also have the concept of releasing appointments, right? So you can start to build out some schedules. And if you don't want the technicians to see what they're supposed to do yet, you can wait and then released the jobs.

DAVE

1:02:16 When they see a work order grew up on a screen or are they able too, are we able to get an alert, basically say that they view the work order, you bet?

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

WILL

1:02:29 Hello? Acknowledgement?

CHRIS

1:02:35 Yeah. I would assume. So, let me get back to you on that though. I don't think I've been asked that question.

DAVE

1:02:45 You know, technician receive orders, able to change, like status is like traveling, yes.

CHRIS

1:02:52 Yep. So if you see all these little blue lines, these are the technician, dark blue is traveling.

--- Tech On-site ---

CHRIS

1:02:57 Light blue is actually on site. And then each little uptick is a clock event. So you'll see where the technician is. Hey, I'm on my way. Alright. I'm actually here now, I'm actually gonna clock in on site.

DAVE

1:03:14 One of the things in the work quarters are there, are we able to create tasks for, you know, ask for a different client.

--- Tech On-site ends ---

DAVE

1:03:22 Let's say one client, we operate a certain client robberies, their name and their steps and measures, they must pay for all as it with people.

CHRIS

1:03:31 Correct.

--- Dispatch ---

ROB

1:03:43 So, is there any integration with like routing the text the most like efficiency from one job to the other job? And we know like, hey, which one would make the most sense?

CHRIS

1:03:52 So, there's not any route optimization tools, right? And there's a couple of reasons behind that we don't know what traffic is gonna look like. We don't know what, whether can dictate, we don't know if there's a major event that can dictate the route optimization. So it's not a route optimization tool. What we can do is give you visibility of where technician is and where the open appointments are.

DAVE

1:04:20 So like a map feature that show or technician is?

--- *Recurring maintenance* ---

CHRIS

1:04:24 Yep. So let's kind of migrate to that conversation here because so that's kind of the reactive service call and I'll show you what that map looks like here. In a second, some more of the predictable, the preventative service work here is underneath of that tab called service opportunities. We can run a report that says, hey show me all stuff that's overdo this month, next month by my different offices. We can limited to reoccurring one time, all services, right? So one time would just be show me all my service calls I have going on recurring is show me all my PMS approve would be show me all my quoted work that's been approved that we need to go get done. And then my service lines, right? Hey, it's the fall. I wanna see only my boiler work or it's the springtime show me all my rooftops. Again, we talked about assigning text, the services. So if I only want to see the stuff that Chris Kidd well handles, right? I could go run a report. They're specifically for all of Christmas stuff again by location, regions, et cetera. And then you would just click search. What most of our customers do is just check this box and they would create all of those specific jobs that they want to see because this is a demo account.

--- *Dispatch* ---

CHRIS

1:05:32 I don't wanna kill all of the jobs. So, I'm just gonna snag a couple... and I'm gonna come in here and say, hey, these are going to be all of my preventative maintenance jobs. Quick snippet of what we're supposed to do. We got a two hour expected 300 bucks here. Blah, blah, blah, I'm gonna go ahead and create these eight jobs. Okay. What that does is that essentially creates those eight jobs onto this map? Okay. And again, we can filter this out how we need to see the specific map. Hopefully, I've got the right boxes checked. I could see when it's due by, or if it was the jobs that were actually scheduled. My date range. Again. I can filter out the map view by the service line.

CHRIS

1:06:17 I can filter out by price. So show me only this out stuff, 1,000 dollars and higher, right? Beginning of the month. I want to get some of the bigger cats and dogs done. I can limited by region area. And what that does is that's gonna throw everything up on a map. Let me Zoom out a little bit and you can see here. Everything's color coded by technicians, right? So, Shawn's green, Ben is orange, a quick weekly view of kind of what's going on and I can flip that to the daily view if I need to. But as I scroll down, somebody just took my rally job. We will track all of the color coded, right? And everything else. Now... the technicians are associated with that specific job and all this is drag and drop as well, right? So what do I mean by that is if I wanna take our C Abbott and put him on that job, that icon is not turn the pink. And then when I drag and drop and say, hey, avid, you're going to get there on Saturday? There's now a calendar icon in there. If it's going to be a two day appointment, right? I can drag and drop that on the two days. Now, you can see we'll be out there for two days and let's just say that, hey, we actually need to technicians on there. So now I got two technicians on a spin on this specific job for two days... and that's kind of showing you what a map view would look like.

DAVE

1:07:43 Is it, do you have the ability to show current location?

CHRIS

1:07:48 I'm sorry, I didn't hear that would say what?

DAVE

1:07:50 They have a current locations for technicians as they're using the program?

--- Tech time tracking ---

CHRIS

1:07:56 Right here, we would have all of our clock events of technicians clocking in and out.

ROB

1:08:00 Okay.

--- Dispatch ---

CHRIS

1:08:12 So that's kind of the scheduling, the reactive scheduling on the dispatch board, and then the predictable scheduling side. Any other questions?

--- Dispatch ends ---

DAVE

1:08:30 You, can I answer any other questions that I had? Because I was gonna say I was gonna ask that question about one of the map or?

DAVE

1:08:42 No, go ahead and keep we're hitting, go ahead and.

CHRIS

1:08:49 So, well, I think I'm gonna end on... the conversation. I don't think this matters. I was going to end on quick site but being that you guys use PowerBI, I don't think this conversation really matters because I would assume you would continue to keep that reporting tool. So kind of that's pretty much my dog and pony show them.

WILL

1:09:12 I think it, yeah, I mean, it's good to know this is here, Chris. I think it would depend. We've that candidly, one company uses Tableau, one company, how to use PowerBI, the other one uses their internal tool that they have today. So it's a bit of a mix. We do probably plan that we have PowerBI licenses already because we're largely a Microsoft already... I think well, I guess myself.

--- Accounting ---

WILL

1:09:34 So I'm gonna make is tell me if I'm wrong, most of the stuff that's on here with quick site. As long as the data exist in the system, we can probably build a report for build something to generate off of it. I know you've got some stock ones up here, but I'm gonna assume that the tables exist, the data is captured some point throughout the process. We could probably connected and create some type of dashboard report.

--- Tech On-site ---

CHRIS

1:09:55 Correct.

WILL

1:09:56 Yeah. Okay. One thing that didn't come up but I would think I would assume you could do it. But the exception report we saw with the technician, for example, logs in or checks and 45 Miles away from a site, something like that. Is it able to generate a report that shows here's?

--- Recurring maintenance ---

WILL

1:10:14 I don't know. I'm assuming we can set a threshold, it's flagged in some way here's. A list of these incidents, you know, or is it something that you need to individually track by technician by work quarter or something like that? Or is there like an exception report you could generate?

--- Tech time tracking ---

CHRIS

1:10:27 Now, there's a report that you can generate. We actually had a customer in DC who had some suspicions of what you're I think you're going out and he basically ran a report and said, look guys have track this. I have X amount of hours based off of a weekly basis of you guys cheating the system, right?

--- Customer engagement ---

CHRIS

1:10:45 And now that I have service trade, I have the capability to see that, fix it or I will dive deeper and fix it myself and they straightened up.

WILL

1:10:55 Yeah, that's a.

CHRIS

1:10:55 Good point. Yeah, there's ways to get that report.

WILL

1:10:58 Yeah. I mean today today's, yes, we have like four people that basically audit every single work order that comes in and against GPS systems with trucks because we, we've had customers. Actually, you know, of course, they, they'll they wanna make sure we're doing our part to make sure we're tracking that customers at some companies before ask for logs that sometimes approved that we have at least, you know, done a good effort to make sure that we're tracking and not, you know, and stuff way before we get there. Some customers do, but just wanna make sure that features there.

--- *Customer engagement ends* ---

CHRIS

1:11:29 Yes. Yup. That.

WILL

1:11:31 Features there.

WILL

1:11:35 I guess, Rob Dave. Anything. You guys, any other questions you guys?

DAVE

1:11:39 Have...

DAVE

1:11:46 Not off the top of my head. Really for me, one of the big things was making sure that their steps in the work order that would ultimately want at some point like to have the technicians... accountable for IB, are in calls which will help assist dispatch and allow us to expand or bandwidth.

--- *Dispatch* ---

DAVE

1:12:06 That kind of was a big deal. Yeah. But as far as the drag and drop features, I think those are excellent. It looks like it's very easy to put a call in and to schedule it for dispatches.

--- *Assets* ---

DAVE

1:12:23 Not very complex process. I guess the other thing was, is... I don't know if I missed it in the beginning but when entry work orders in the system or the broad base work quarters where you're not selecting one piece of equipment to create an order form or can you create a service call that just says, hey, we're there to investigate the BH VC base location and then be able to select the assets as.

CHRIS

1:12:54 Yeah. Yeah. I kinda, I went over that rather quickly but yeah, I'd say eight, hey, something's broke, go to the building and fix it or we can get more granular of like, hey, they're saying no heat. It's probably a boiler system, but to your point, you know, hey, go go out that one, two three location and figure out what we need to do from there. And then the technicians would enter whatever data they need to enter to save. They did what they did.

DAVE

1:13:17 Okay. Yeah. Because a lot of the calls we get aren't necessarily specific. A lot of them are simply saying their locations or for duration down into that specific, okay necessarily. And so I just want to.

CHRIS

1:13:38 Yeah, we default back to what we call the building, right? So, hey, something's broken at the building, go fix it. And then the technician can then get more granular on the detail once he arrives and diagnosis, whatever is broke.

--- *Assets ends* ---

ROB

1:13:53 Chris, is there the ability whenever like so most of our emails, most of our work orders come over based off an email is their ability and find this is at the beginning because I hopped on a couple of minutes late. Sorry about that. Is their ability for the work orders to be auto created in the system or is it everything? Were there has to be a person that's manually entering every work order?

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

CHRIS

1:14:12 So the question I think would be how are they coming over via email?

ROB

1:14:21 Basically a service request email that basically has all the information. I have the work order number, description of the location, what the client is? It just basically all the email that would be like if you're looking at the job, just send an email format that goes to, you know, service that acs H back dot net.

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

CHRIS

1:14:39 So if they're coming over in a consistent format, that's gonna probably be some development work, but we should be able too auto generate work orders based off of that email as long as it's coming over in a consistent format.

WILL

1:14:54 Right. Question. Just to well go ahead. What I was gonna say, Chris, just like the context. And I was like some of the systems we've seen again rules based as long as it, you know, if this then that et cetera. Then they set up a work order in the system automatically. And so then you go in and basically do I want to accept this war quarter in my system or it was this, you know, are honestly sense? I mean I can hit reject and then I'm gonna reach back out to the customer because they tried to dispatch us in the last or something that's where that question on them. I can't just thinking of head count. We have like 44 people right now just today CS that do nothing but copy and paste information from emails into work quarters today, Chris and their system that they have, they did not have to do that because they have a pretty good made this with Chris was about to ask, but they have a pretty good system where they can, it basically auto generates into the system and then they can just accept or deny it or whatever they wanna do with it. Sorry, I'm sorry, I don't mean to cut you off. I just want to give you that context for us... that, that's exactly what I was doing it. Yeah, thank you.

CHRIS

1:15:57 Yeah. I think, you know, so manage the business for the majority, not the minority, right? There's. Always going to be exceptions.

--- Accounting ---

CHRIS

1:16:05 So especially when you get into some automation is, you have to realize and understand is going to be some exceptions there. If it's coming over a consistent format, you can put rules around and triggers that says, hey, if X comes over, go ahead and generate why and bring over a BC.

--- Accounting ends ---

WILL

1:16:22 Yeah, because it, I mean, candidly, Chris of our business even across all three businesses, probably 10 customers account for 95, 98 percent of our business. We basically have several large national account, thank you or walmart or target your logo like that. And that's 97 percent of our business.

--- Quote templates ---

WILL

1:16:39 But I agree with you there's always the exceptions that somebody's gonna have to copy and paste manually because somebody send it over to worry format that's a long tail customer.

CHRIS

1:16:47 Yeah, yeah.

WILL

1:16:48 Being able too, but being able to auto generate the 90 95 percent and turn that into just a few clicks versus, you know, a 45 second, one minute copy and paste.

--- Quote templates ends ---

WILL

1:16:57 When we do a CS, does three, two, 5,000 work orders a month across all the companies were probably doing cluster to 10 to 15,000. Sometimes work orders that adds up pretty quickly in terms of manpower.

CHRIS

1:17:11 Yeah.

BRETT

1:17:12 And just to clarify guys, when they send you an email as a service request, is it just the customer saying, hey, I need this or is it through a system?

WILL

1:17:21 It, it's usually an audit, go ahead, Rob.

ROB

1:17:24 So it's basically it's through their portal, is what's basically happening is that their store is calling into their system and then generates into, you know, service channel affects a FN pilot, whatever. And then it's generating an email that goes over to us. They all look the same. There's not any really difference except basically what portal they actually.

WILL

1:17:46 Yeah. Yeah. There are system generated emails. It's not like, you know, Brett at 711 and send me an email at that could happen. But totally understand those are one offs and can be, you know, address that way.

CHRIS

1:17:59 Yeah. Okay.

BRETT

1:18:00 Thanks for clarifying guys. I'm just taking some notes.

WILL

1:18:03 That's good clarification. So, I mean, one take away and I think Christopher join later, but send me a note about the integrations and stuff like that would be good to understand and where we are as a follow up... because that one, I mean, we just talked about again, that stuff ends up just adding a ton of manpower. We see it today at acs because we don't have the integration. The other two companies, their systems do have integrations. And because of that, they see us as a much by worse back office to technician ratio because we have so many office support personnel. It's up to manage all of those random. Thanks.

CHRIS

1:18:41 Yeah. Yeah. And so what I think I'm gonna do is I'm go get the service channel integration scope of work as to what and where that is, and put that into recap. And that's got a visual to tell you all the different touch points and what flows from what, and what the triggers are. Because honestly, well, I don't know what that is off the top of my head. I gotta go. You're out what those trigger points are and what data fields flow to what data fields.

WILL

1:19:07 Yep. Nope totally go. Okay, awesome.

CHRIS

1:19:13 Was gonna say, I mean, is there enough here for me to put together a proposal for you guys to talk numbers and dollars?

WILL

1:19:21 Yeah, that would be good. And then what is the way we're thinking about it? Is basically here's your proposal and then here's our confidence of the integrations or that we can get around it and let's say, I'm gonna make up a number, 100, let's say it's 100, whatever it is. Now, we're gonna have to add 40 FTS across the business to make up for the lack of integration or whatever. So, like if you come to us and we feel really confident that the integrations and stuff are there and it can be proven out or whatever. The next, you know, couple of days than that 40 goes away. You get what I'm saying?

--- Pricing ---

GEOFF

1:19:52 That's...

WILL

1:19:52 How we're thinking about it from an ROI perspective?

CHRIS

1:19:55 Okay.

GEOFF

1:19:56 And if... do we have any indication on pricing for tax?

CHRIS

1:20:04 Yeah. So... our pricing is on our website... per tack. I think you guys would need to be on the enterprise level. Obviously with the volume, this doesn't include the volume discounts.

--- Purchase decision ---

CHRIS

1:20:18 So that's why I wasn't really gonna have this conversation. I was gonna put together something a little bit more creative... right? Because I didn't wanna, I didn't want to give the Salesforce experience, right? So kinda wanted to take a couple of minutes and put together some. Basically I was gonna put together to proposals.

--- Pricing ---

CHRIS

1:20:34 I was gonna put together a one year license at 175, and then a three year proposal with growth going up to about a 1,000 licenses with discounts built in based off of growth expectations. So kind of three year deal priced at 175 year, one, 500 year, 2000 licenses, your three.

--- Purchase decision ---

CHRIS

1:20:52 And then I think if I put those together and send them over to you guys would be able to kind of see what that roadmap looks like.

WILL

1:21:00 Yep. That's right. Chris.

GEOFF

1:21:02 Hi, I was trying to get pricing we have right now part of the other platforms to see.

CHRIS

1:21:12 Yeah. And so... I'm not good enough to kind of think of what those numbers are off, you know, off the top of my head, I'd like to have a little bit more of a formal presentation versus just trying to willy nilly something right now.

GEOFF

1:21:27 I would tell you right now, your pricing is not competitive like it's substantially outside of our pricing we have. Yeah, just to, you know?

--- Purchase decision ends ---

CHRIS

1:21:40 I mean.

GEOFF

1:21:42 I don't wanna waste your time. I don't want to waste emails on the calls time... but, yes.

CHRIS

1:21:48 Yeah, I mean, what, I mean? What did you guys have in mind, you say substantially?

WILL

1:21:56 I would say Chris is, I know you will only charge per tack as well. And so there's nuance. So I think we would also need to do the math on because again, what we're thinking about too is how many FTS have to support each tech, et cetera. I would say because just send over what you've got to just pointing to even doing that math right now. The list price in the websites obviously not very competitive. But again, we've had that experience with one or two other vendors already. And so I totally agree with Geoff but I wouldn't want to and candidly like again we've set up before we kinda right the ninth, I mean, which is good for you because apparently one or two other people have asked about it. We have also not talk to USA. So in full transparency. So I don't know if they've had a good experience with you all. I don't know if they have a bad experience with you. All, I do plan to talk to them at some point but we have not where I have a Geoff, I don't know you may have. I have not talked to USA mechanical about their experience?

--- Purchase decision ---

GEOFF

1:22:49 No.

WILL

1:22:51 Yeah. So I'd say Chris, good. Just send us what you've got. But to Geoff point, obviously, we wanna make sure it's compatible. We don't want to waste your time going back and forth and we'll tell you if it's not competitive, then we're not gonna waste your time going back and forth that's something that, that's not close.

Obviously, you guys have your own internal controls. Yeah, it's not, can't always split there?

CHRIS

1:23:11 Yeah. And, you know, hey, again, this is, I think what I really want to have this conversation, I wanted to put together a guys, this is based off of our conversation today. This is what this would look like and it's going to be the best foot forward right to your point. Well, no need to go back and forth. And if we're close, we'll keep talking if we're not even close, let's shake hands and we'll part ways?

WILL

1:23:31 Yeah, absolutely. But again, we, Chris and Brett really appreciate you guys doing the demo together the last minute. What skeptical when I reached out that we can put something together that quickly which we'd include you guys in the demo process earlier.

--- *Purchase decision ends* ---

WILL

1:23:44 Again, I can't remember why I think product. So Ryan had marked off last year. We also did initially but I'm glad we were able to do it and see your product. Yeah.

CHRIS

1:23:55 So, go, you'll see an invite for recapped over there. Will put together. We'll put all of that follow up information service channel integration, the Intacct, integration, the touch points, all there, I'll put together those two proposals and get those into that recap collaboration space as well. And then I'll touch base with you in a couple of days and...

--- *Pricing* ---

GEOFF

1:24:13 See.

CHRIS

1:24:15 Where we go from there?

WILL

1:24:16 Okay. Sounds great. Thank you.

CHRIS

1:24:18 Friday work for you. Well.

GEOFF

1:24:21 On pricing like I'm looking at Microsoft dynamics just for, so we're at it's roughly 700 dollars per tack per year, the way your pricing it. So we're lap, you know, roughly a third us was guessing roughly a third of what your website is... and I can no pressure other ones, but that's just to give you an idea like a ballpark. So... yeah, you need to come down considerably. I don't know if that's in your wheelhouse or not.

CHRIS

1:24:57 I think I... let me go see what I can get together.

GEOFF

1:25:01 Yeah. And this thing, either those are actually published rates. So with Microsoft dynamics, we're using our teams license for tax and we have a full office license for the office people. The teams license or eight dollars per tack per month. The office staff is about 95 or six dollars per month. You know, what our ratio there's roughly to text per office person just for trying to, you know, do the math here. So we're not, I mean that's public pricing for that stuff. So.

--- Pricing ends ---

GEOFF

1:25:38 It's fair. You know, just trying to.

CHRIS

1:25:42 No, I appreciate that helps me put my best foot forward.

GEOFF

1:25:45 Yeah, you can meet and go over the pricing to you for Microsoft dynamics, but that's the way our, you know, consulting substructure that's... and they have similar abilities that you is you guys have?

CHRIS

1:26:01 Okay. Alright. Well, we'll get that over to you guys here in the next couple of hours. Will I will probably touch base with you either tomorrow or Friday to see if you guys have had your conversation and we'll go from.

WILL

1:26:16 Yep, absolutely. Okay. Thanks a lot Chris.

CHRIS

1:26:18 Great. Thanks guys.

WILL

1:26:19 Yeah.

The End