ServiceTrade Demo with Mall Energy

Charlie Riddle with Mall Energy
Recorded on 6/9/21 via Zoom, 1 hour 8 min.

Participants

ServiceTrade

Charlie Riddle
SDR

Aaron Ward
Territory Manager

Mall Energy

Kendall Archer
President

Other

TraciePowers

19038447010

Topics

Transcript

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CHARLIE

0:03 Good morning, guys. Can...

19038447010

0:04 Hear me? Good morning.

CHARLIE

0:08 Good morning. How are you guys doing?

19038447010

0:11 Good. How are you?

CHARLIE

0:13 Am doing well. I'm doing well. Let's see. I've got Tracy and Kendall in here. It looks like somebody cold. Yeah. Is that you duration so far speaking?

19038447010

0:27 Tracy? Yes.

19038447010

0:33 Interesting industry. I'm sorry, no, no.

CHARLIE

0:40 Of Raleigh, North Carolina. Where are you guys? Like you guys are laid water?

19038447010

0:45 Right along the east Texas. Okay. Gotcha. Yeah.

CHARLIE

0:51 Texas. I heard your accent there when you send an.

CHARLIE

0:58 Hi, Tracey. What is your role over there?

19038447010

1:03 I do... dispatching, setting up jobs. I'm scheduling and invoicing accounts payable and keep going, ordering parts and receiving part.

KENDALL

1:24 Do that less stuff.

19038447010

1:26 Hello? Wow. Well... I'm gonna... I'm gonna.

CHARLIE

1:34 That sounds like you're the firemen and you just put out fires all day?

19038447010

1:38 Yeah, I do my level best.

CHARLIE

1:43 Kendall. Good to see it.

KENDALL

1:45 Let's see Charlie. Thank you.

CHARLIE

1:48 Yeah. Where are you doing this morning? Anything crazy going on in your world?

KENDALL

1:52 That's always a little crazy. Love it. Always busy.

CHARLIE

1:57 Hello? Is this since everyone joining us here today? We waiting?

KENDALL

2:01 Yeah, this is it.

CHARLIE

2:02 Okay. Guys. Let's go ahead and jump in. Thank you for joining me. My name is Charlie rental. I'm the territory manager here at service trade for the central United States. I work with companies that do H back and mechanical and refrigeration, and fire and life safety, and all that good stuff, how I like to, but want to spend the first little bit getting to know you guys, I want to understand your processes as they are now and maybe where you're hoping your processes could be.

--- Purchase decision ---

CHARLIE

2:28 I'll give you some context for service trade. Not much because I know you guys have seen it before, and then we'll dive into the platform itself. If at the end of this, you like what you see feel like it's a good fit. We can go ahead and bust out next steps and talk timeline and implementation and pricing and all that good stuff. How does that sound?

--- Purchase decision ends ---

CHARLIE

2:48 Well, let's jump in. I had a conversation with Aaron and I know Aaron spoke to you on the phone and he was giving me a little bit of a rundown... you know, you guys had previously worked at service trade twice according to my records here. I see back in 2018 and then 2019, you looked at service trade and now you guys are back. So tell me about that. You know, you went with building ups or building reports, one of the two and... and weren't happy with it. Looks like building apps. So what... what happened there?

KENDALL

3:24 Well, I'm not gonna give you the whole long story short. We're just trying to find something that works for us and, you know, I've got notes on... I think every field service software, an app that ties into Quickbooks that we evaluated and it's just, it's hard to find a good fit for what we think we need.

--- Purchase decision ---

KENDALL

3:50 And so... we, you know, with BuildOps back in November because it look like to be a good fit, but implementations is drug Andre... Andre gone. And then when we find really dive into it and see what they did, it look like they weren't quite ready. Either it's a newer platform. So in the end, it's they're just not really ready to go. So kind of circling back around and looking at the top few that we had... and you're up there.

--- Accounting integrations ---

KENDALL

4:29 So... so we're just trying to get some work right now. We're using these Quickbooks for inventory for payroll, for the work orders, for invoicing all that stuff. And we are using pipe drive which is our CRM. Okay. It's a fairly robust CRM. We're just kinda chew on a union work.

--- Accounting integrations ends ---

KENDALL

4:55 So we put all of our equipment tracking in there. We use our... our field techs, use that in the field. You know, we can schedule stuff through that weekend. They can type the story and... and it comes back to us and then we can basically copy and paste, put it in Quickbooks, kinda finagle it from there. That's what we've been doing and it's you know, little unwieldy, but.

CHARLIE

5:26 Yeah. I think the fact that you're using a CRM as a service management solution, I think that you're probably stretch on the bounds of what that was meant for.

KENDALL

5:35 Yeah.

19038447010

5:36 Yeah.

CHARLIE

5:36 You know, when I think of CRM, so I think a prospecting and I think of the sales process as opposed to service management, service workflow. Okay. So Kendall, you've looked at others, you've looked at service trade, you just went through a process with... with building apps. What are your priorities here? What... what boxes do we need to?

KENDALL

5:59 Well, we wanna enjoy what we, what software we pick. Glad that we've gotten... I'd say top... top of our list is the equipment that we use.

--- *Assets* ---

KENDALL

6:15 You know, we work on equipment for the customer. Okay, generators is what we do. So there's just a few different pieces of equipment, but each piece of equipment, it's very customized. And so like an HP AC system, it may be model XYZ. And then every model XYZ has the same equipment on it, same components and all that stuff we're in the generator world. Model XYZ is just top level and then it can have all kinds of, you know, the configuration of, it can be completely different between XYZ. So we need to really track, we need to be able to track the filters, the type of belts, the control panel that this... that, this, that, you know, for the piece of equipment.

--- *Type of work* ---

KENDALL

7:03 And then, you know, track work done towards that piece of equipment. The service agreements is a very big thing that we do. So being able to set up a service agreement that makes sense and not having to click, kinda doing what we found there's a lot of workarounds on a service agreements because in... in our world, we do, some people might call it an annual and quarterly or something like that which on majors and minors.

--- Recurring maintenance ---

KENDALL

7:35 And so when we go out, if we have an annual schedule with a customer, we do one major. And if we are doing a quarterly schedule, we do one major once a year, and then three minors, you know? So the... the difference in a major and a minor. Basically, we do all the same inspections. But then we change fluids and filters on major time that's just once a year. So, and then we have low bank testing that we do as part of that. So we just need to be able to set up a service agreement schedule.

--- Recurring maintenance ends ---

KENDALL

8:08 You know, that makes sense for us. Okay? And then... all kinds of other things to the dispatching, the being able to easily see what's going on and follow up on stuff, see on assigned jobs and assign them... everything.

CHARLIE

8:31 For, okay, I think we got, you know, let me ask you this. What... what... what negative or why did you go with BuildOps over service trade in the past? What was it just BuildOps was, you know, filled your while to streams or did you feel like service trade was missing the mark somewhere last time?

KENDALL

8:50 Hi, did... have to go through everything again. I mean, there's I've got... I've got a meeting notes on all kinds of different.

CHARLIE

9:01 Hello, hi am.

KENDALL

9:02 Though.

CHARLIE

9:03 And that was last year. I can't tell you how many people hop in here who have seen service trade before and they're like, I don't know.

KENDALL

9:09 Yeah. Well... there's certainly a, and I'm hoping some of it may be as improve your changed or maybe it's not.

--- Pricing ---

KENDALL

9:23 But basically, I mean, I have one gone through the last few... minutes over to service trade. I think back in 2015, 2016. I'm trying to look at it through different lands right now. You know, that time we're trying to find something that does everything we want it to be or at least 90 percent of what we think we need.

--- Pricing ends ---

KENDALL

9:50 And I thought that was it with BuildOps when we finally signed with them. But that was more of a salesman telling me one thing we get into it and it's not quite doing that. And so I'm trying to put a different filter on when I look through these and see what makes the most sense even though it doesn't get every box that we want. So really that's why I'm going around right now... they can look, I mean, you're... you're upfront onboarding costs were very high in my opinion, but... I'm willing to look at it, make sure it was very, I like the decisions, the efficiency part of what you had in the quoting and following up with that on each piece of equipment. I thought that was really good. Basically, I just want to go through it again. Tracy, I hadn't seen this as well. So I want to get her take on it.

CHARLIE

10:47 Perfect. We'll... we'll thank you. Thank you for that. I can't tell you how many times I hop in here and it's like pulling teeth trying to get people to tell me what they want, what problems are going through, what they're looking for something like this. So, thank you... before we jump in. I have a round of, you know, what I like to call stupid questions and some pretty basic stuff, but I just wanna make sure none of your information has changed since last time. First of all, are you guys still all commercial residential whatsoever?

--- Type of work ---

KENDALL

11:15 No, we're both. Okay. Mostly commercial but residential creeping on. Yeah, it's probably 15 to 20 percent residential, correct... but I would rather treat our residential customers like commercial customers then get a system that's residential and... and trying to treat our commercial customers like residential customers.

CHARLIE

11:39 Yeah, I think that's what we would promote. You know, we're certainly made for the commercial space, but we have lots of customers that also use it for their... their residential side as well. Yeah. How many texts you guys have in the field right now?

KENDALL

11:53 We have three.

CHARLIE

11:54 Okay. Have you guys carved out a budget for what you're hoping to pay for something like this?

--- Pricing ---

KENDALL

12:07 Yeah, it's in the budget... go company that I would like to pay a couple of 100 bucks a month, but.

CHARLIE

12:18 And, you know, when are you looking to... to make a change on something like this? Is it, are we talking a couple of weeks? Are we talking next year?

--- Purchase decision ---

KENDALL

12:27 Once we find some way like we're gonna pull the trigger, that's what I thought we were doing with BuildOps.

CHARLIE

12:39 All right, guys. Thank you very much. Let's jump in. I'm going to go a little bit faster through this introductory section so we can save some more time for... for getting to the meat and potatoes. But also because you guys have seen this before, but if you have questions, please speak up and... and ask if you hate something, if you love something, if you don't understand something, we can certainly go into a rabbit hole here. So we got our start about eight years ago.

--- Type of work ---

CHARLIE

13:05 We work with companies as small as two or three times like you all the way up to the big boys with four or 500 tax here's. A handful of our larger H back and mechanical customers that we work with. Okay? So we're a service management platform. We're gonna help you guys wrap your arms around the entire scope of your service operations for scheduling dispatch from that mobile app to help you guys perform the work to that quoting workflow.

--- Customer engagement ---

CHARLIE

13:29 And then something that's new that you haven't seen yet. Kendall is we have an interactive quote at the end of the workflow. Okay. That's very... that's very... very cool. But wait, the way we differentiate ourselves from our competitors is that we consider ourselves to be a customer engagement platform as well too often in this industry, the only time the customers communicated with us at the beginning when they have a problem, and at the end when you're asking for money, and we don't think that's a happy customer experience.

--- Customer engagement ends ---

CHARLIE

13:53 So to that end, a lot of Headspace in service trade is designed around communicating with your customers, providing transparency and setting expectations with your customers or mission statement here's. That we work with commercial service providers to help make you guys more valuable to your customers. In fact, we think that's the key to helping you guys grow your business Kendall. I know it's a loaded question here coming out a COVID in quarantine but... but what are your growth goals that you're writing on right now?

KENDALL

14:21 Live and do the best we can. But that, I mean, we would like to, I like to add a couple more tests here, but then further growth would really be different locations.

--- Type of work ---

CHARLIE

14:33 Okay.

CHARLIE

14:38 Gotcha. Yeah. So that's... that's really our claim to fame. Yes, we do work with the big boys with 400 tax, but the vast majority of our customers are in that two to 20 tack range. And we work with those guys to get some from process in place that will help them grow but also grow and scale with them guys.

--- Customer engagement ---

CHARLIE

14:57 I'm going to give you a highlight of three things we're about to see today. Keep in mind that all three of these are centered around that customer engagement mindset of communicating with your customer. The first one something super small to something that we think goes a long way in route notifications. Your text can now send a notification to your customer when they're on the way. Hey, stuck in traffic one hour, whatever it is. This is not mind blowing, but what it does is it sets the bar. This is the level of communication you can expect from us today.

--- Customer engagement ends ---

CHARLIE

15:25 This is the level of, to our service. Now, something that I think you remembered. We have an inner well, this is one of service trade strongest workflows. We make it super easy for a tech to identify deficiency report that to the office, get a quote made and get it approved.

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

CHARLIE

15:42 And it is an interactive quote so you can attach pictures and videos and audio members, and all this great stuff. And when the customers ready to approve it, they've got a refund approved button in the top right now at the end of the job. And this is new, we've got an interactive invoice. Okay. Too often in this industry, the customer doesn't know where their money is going. My generator supposedly was busted and now it's fixed where to about 3,000 dollars go? They're gonna come to this interactive invoice to see this. Yes, we have a pay now button. But the important thing here is this blue button right here that says, go to service details, customer's gonna click that and they're gonna come to this page. We call it a surface link. It's a report that service trade automatically generates automatically compiles throughout the job. It's gonna have a section for details. Hey, what do we do here today? What did we accomplish? It's? Gonna have a section for files, what are the... the before and after photos, inspection reports will automatically show up right there.

--- Deficiencies ---

CHARLIE

16:36 A PM reports, any videos that you want to share with your customer as well? And then lastly, it's going to have an alert section right here. And these are your, hey, we found three problems that we found three D efficiencies today. Okay. I expect a quote coming your way.

--- Deficiencies ends ---

CHARLIE

16:50 So when your customer sees that they understand what's going on and when they come back to this invoice all of a sudden, that 3,000 dollar Bill or whatever it is isn't as big an elephant. Now, end of the day, we're here to make you guys more money.

--- Customer engagement ---

CHARLIE

17:04 I think the step that I'm most proud of is that after the first year of working with service trade, our customers on average seeing an increase in service revenue of 23 point four percent. That is an automated up number that is data from our actual customers. We're going to drive that revenue in two main ways. The first one is our quoting feature. We believe that a strong quoting workflows, the bridge between PM work with relatively low margins and repair work with high margins. Okay? Secondly, we're going to drive that through operational efficiency through our scheduling and dispatch tools. The feedback that we've gotten from our customers is that each time can get to at least three more jobs a week.

--- Customer engagement ends ---

CHARLIE

17:42 I'm not sure what your average service call is, but you do the math... guys. Any questions before we hop in?

19038447010

17:51 Nope. Nope.

CHARLIE

17:54 Right. Let's do it. So, I've got a job made up here that we're going to act out here today. But before we do that, I want to show you two things that it will do a good job of kind of framing a few things. The first one is, I want to show you our dashboard. This is the first thing you're gonna see when you log into service trade in the office view, 5,000 foot view. Tracy. I have a feeling you will be using this dashboard. Okay? Spending a few minutes on this page each morning might give you a good idea of where you need to spend time today and an admin sense. Okay? It's full of buckets that catch tickets in various stages of the workflow. So coming from the top here's, our daily schedule here's. Everything we got going on like it. So we got some action going on here this morning. These next two buckets, one of the ways we help you guys get visibility of those recurring service intervals.

--- Recurring maintenance ---

CHARLIE

18:45 Okay? When you go up in service trade, you have an option to associate a time hon with it. This is how you manage your recurring services. These two buckets are saying based off that information, you have 1,500 past two PM that you need to knock out. I wouldn't hope you never have that many.

--- Recurring maintenance ends ---

CHARLIE

19:03 This one right here is being proactive on the other side of that coin. These PMS are coming up doing the next two weeks. You might not think about getting somebody out there and knock it out. Another great bucket down here at the bottom is completed jobs to be invoiced. This bucket as saying, hey, the technician has signed off our work is done. All we gotta do is getting them voicemail and get us out to the customer... Tracy, what do you think? Is this something that would help you out?

19038447010

19:29 Do you have a, is there like a calendar with a weekly view by any chance we do... we do?

CHARLIE

19:41 Yep. So yeah, we're for our scheduling and dispatch tools. We do have like a day view. If you just want to get one day schedule to make the best decision, or you can look at a week view. And if we have time today, I'll be... I'll be sure to show.

19038447010

19:54 Can you drop and drag, move stuff around?

CHARLIE

19:58 Absolutely. It's almost like if someone was.

19038447010

20:02 Yeah, we use the weekly thing a lot, okay?

CHARLIE

20:07 In advance. Do you guys generally schedule?

19038447010

20:11 Sometimes two, three weeks ahead of time?

KENDALL

20:15 Yeah. I mean, we'll have of course, our preventive maintenance, you know, that's a years out but then it's usually... two two weeks. We like I would like to have a two week. Of course, it changes every, you know, as calls come in and always changes but be great if we had that two two three weeks.

CHARLIE

20:38 For... alright, the next thing I wanna show you is what I like to call our data model here's.

--- *Assets* ---

CHARLIE

20:46 The history portion that was the store, your customer history or repair history, your asset history. Okay? So we make the distinction. I'm on the job page right now and we make the distinction between the Bill to in the ship to because a lot of times you're working for a company, but they have multiple locations that you need a service. So what I've done is pulled up the location page underneath this Bill to, we're gonna be surfacing all province element right now. When I click on jobs on this page, I can see every single job we've ever done for this customer. I can click into any of these, the past documents, pictures, notes, invoices, you name, okay? When I click on assets here's, our list of equipment that we service. Now, I've got a hodgepodge of assets in here because I do these demos for a lot of different types of companies, but you guys would see your generators. Okay? I've got one right here. We can click into it. Now, I just created this asset for us here today. So we're not gonna really have any history on this generator, but I want to click in here and show you kind of the capabilities of the fields. Come to one of the things that you mentioned was being able to track all this great information about each specific generator. Okay? So when I pull this up, I have about a 1,000,000 different fields I can fill in, right? So I... I took the time. Let's say it's located in the food court. It's a good, my manufacturer model T3 thousand here's. Our serial number where you can go into voltage and engine model, an engine, serial number of apps. And for anything that you don't see here, you've got a note section so you can put in I think filters with something that... that you mentioned.

CHARLIE

22:28 Another great thing you can do here is attach documents to an asset page that can then be pulled up in the field. Maybe it's schematic, maybe it's a manual, have some time. Maybe it's an action plan or maybe it's a specific checklist or PM. You can attach that right there and all of a sudden the tech and act on it and view it. Okay? Now.

KENDALL

22:48 Yeah. Can you go back to that? Yeah, to that particular asset?

--- Recurring maintenance ---

CHARLIE

22:55 Yeah. What's up?

KENDALL

22:56 And go down. I just wanna see the services job deficiency. So you can pull one up and show you the deficiencies that are out there are out there for, is the services... services that are currently?

CHARLIE

23:12 These are all the services and I haven't shown you the tab in the location page yet, but we have a similar one there. These are, this is our commitment of work to this asset. So for example, here is the recurring quarterly PM that I set up underneath this generator and really let's go ahead and jump to the gun here because this is the juicy part. This is where we help you guys track your recurring PMS. So it's all about setting rules. It's all about doing the work. One's putting in that perfect information once. Then you can call upon it later. So, for example, I made this quarterly PM, I wouldn't put it in the perfect description that I want to populate in the job, what I want to act on this, I associated with the right asset, even set rules around what items I want to populate on the job when I want to act on this. Maybe it's a labor line, a couple of parts of trip, charge a flat rate fee, whatever. And then lastly, I, so the associate a time interval with this PM. In this case, quarterly service trade is smart enough to know that when you knock this PM out, it's gonna bump that next due date out accordingly so you never have to remember all of a sudden this recurring services going to start showing up in those buckets on the dashboard where you can run some really cool reports to wrap your arms around all of the recurring PM? So that I know I have coming up next week or next month?

KENDALL

24:29 So, is there a way now that we're probably be jumping around on you now? But sure. So when we set up a quarterly... is there a way for us to do our, to indicate which ones would be a major and which one would be a minor in our world? You know?

CHARLIE

24:48 Yeah. So I'm gonna come back to the location page and I'm gonna click on the services tab notice that's the same tab here for the asset page. But here this time we're looking at all or recurring services for... for this location. Now, you can notate it semi annually quarterly and you can get custom with your intervals now to give you an idea of how you might be able to tackle your major minor thing. Let's... let's act out making a recurring service. Okay? So I'm gonna, so let's do a recurring services for this generator. I'm gonna use a template here and search for generator. I think we've got one. Okay. And then down here, you can kind of say, when do you want this to record, right? So I want this to be due in a whole month rather than a day, but this thing should occur monthly now if you need to. Is it like one out of the four is a major and the other three or minors?

KENDALL

25:48 Yep.

19038447010

25:50 So one.

CHARLIE

25:51 Might manage that. Is I would do a quarterly or a minor PM and I would create a second recurring service and I would make that major. And then I don't know if there's a way that you could do this recurring for three quarters out for you would just see that also do that month is a... is a major and you just would not act on this minor. Does that make sense?

KENDALL

26:15 Yeah. Yeah. I just, I could see that being a problem, but I can see that over the course of three years of doing something like that, if we have quarterly setup... and let's say she have to shift a little bit or you're at the tail end of the month, you have to remember.

--- Recurring maintenance ends ---

KENDALL

26:38 Alright. So there's it's a minor and maybe there's a major that I'm supposed to be doing instead of this minor at this time, I gotta make sure if I skip the minor out a little bit, I got to skip that major out with it. I don't know, I don't know if there's any way to.

--- Recurring maintenance ---

CHARLIE

26:54 I think stay with me here at the risk of making things even more complicated. I might create an, instead of... one one quarterly and one annual, I would create for separate annual inspections and they recur every year. But you... you set one for Q1 one, for Q2 one for queue three. And so on that way, you can always make sure in that queue three and Q4 whatever it is you have that major come... come up automatically. And I would... I would just, I would call them all annual inspections, but make sure to... to notate three of them is wider, am I making any sense?

--- *Quoting* ---

KENDALL

27:41 Yeah, yeah.

CHARLIE

27:44 Questions, good questions... kinda finishing out here the location page. So we looked at jobs. We looked at assets. We looked at services under deficiencies here's. Every problem that we've ever found at this location. And here's every quote that we've ever sent this customer and a quick glance, you can get an idea of, hey, what's my approval right here?

--- *Recurring maintenance* ---

CHARLIE

28:09 Okay. Guys. Any questions so far on anything we've covered? We've talked about the Bill to ship to distinction. We've talked about the location page... guys. Forgive me. I got some terrible harp on this morning. I'm sorry, I thought about the... the location page and asset history and recurring services. Any questions so far?

--- *Assets* ---

KENDALL

28:34 Interesting.

19038447010

28:42 Nope. Can you click on the assets again?

CHARLIE

28:46 Sure.

CHARLIE

28:51 Is there a specific asset you want me to dive in?

19038447010

28:54 Okay. No, I just... I just wanted to, I just wanted to look at it again. Okay. Nope. I'm good, Kendall. Alright?

CHARLIE

29:03 Let's keep rolling. So let's ex out this job together. Okay? Coming back to our job page, bunch of relevant information here at the top or tell me?

--- Recurring maintenance ---

KENDALL

29:12 Let's do one more thing.

CHARLIE

29:14 Hello, please... please.

KENDALL

29:16 Like if we set up a contract and we... and we did it to, for individual, you know, one's a major and then three or minor annual ones and do it that way. Is that four separate contracts was at one contract. It's got four things on it.

--- Recurring maintenance ends ---

19038447010

29:33 So, I think we're...

CHARLIE

29:34 Using the term contract... differently. Here. So what is your process right now for physically creating and generating that... that contract?

KENDALL

29:47 You do it in, are... we doing in our CRM system and we set up? I mean, we just have to go and set up.

--- Recurring maintenance ---

KENDALL

29:55 If we do a two year quarterly, we have to set up a future events or minor... minor... minor major minor... minor... minor that's in the contract. And then those are all out there. I'm just trying to think if we... if we schedule it or we can we track it?

--- ST app contracts and pricing ---

KENDALL

30:16 You know, is it... is it one contract in service trade that has four items or is it for contract or, you know, for?

CHARLIE

30:28 Good, good question. So we get the contract, that piece of paper that kinda outlines all this stuff that... that would not change. It would just be one contract.

--- Recurring maintenance ---

CHARLIE

30:36 Now, when I'm talking about creating a recurring service, you can, you know, once you have your contract, you... you have the power to make whatever, you know, recurring services you like. And it would be, it would be the same pricing structure, right? It would not. The, I guess what I'm trying to say is there's no like contract page on service trade that outlines... what... what parameters you would describe your customer, that processes.

--- Recurring maintenance ends ---

CHARLIE

31:04 But they're still not gonna change that. That's still going to be what you guys do. I know I'm doing a terrible job here this morning explaining.

KENDALL

31:11 Well, I mean just if I'm looking at the asset and I wanted to see what... is there a way to pull up all of our, across our customers?

--- Recurring maintenance ---

KENDALL

31:21 Is there a way to see we've got 400 contracts, service agreements or whatever, or is it just we've got a 1,000 recurring visits? You know?

CHARLIE

31:30 It would, it would be through the view of recurring visits, not 400 open contracts, if that makes sense.

--- Assets ---

KENDALL

31:37 Okay. I'm just trying to think how we would manage all of that. If we ended up putting individual, yeah, it's going to be.

CHARLIE

31:47 You know, I might, you know, if that's a PDF that you guys need to track, you can always attach documentation to the location page to... to... to people to that contract.

--- Assets ends ---

CHARLIE

31:58 But in terms of going into the service trade and saying, show me my 400 customers undercut, you know, in their contracts? Yeah, it's... it's probably not that workflows and not gonna look like that. Okay. Good questions. Any other questions before we... we keep rolling?

19038447010

32:14 Where does it? Show the details of it? Like if you wanted to add notes, I guess you could put them... like the beginning, you know, when it started and when it and... and the amount. And if there's any other notes you want to add on it, is there like an overall? Yeah, we're all that, which?

CHARLIE

32:39 Yeah. Good... good question, Tracy, or are you talking about the contract or are you talking about the job details and notes and stuff?

19038447010

32:47 Just, you know, this, the service agreement details?

CHARLIE

32:51 Okay. Yeah, that would... that would still be manage how you guys are doing it. Now, it would... it would be a document that you guys were Bob and have them sign.

--- Recurring maintenance ---

CHARLIE

32:59 And then you could... you could store that document and whatever form that you guys like on a location page or?

19038447010

33:06 Page. Okay?

CHARLIE

33:11 Once you guys have that contract and get that signature, sure, then you go in and create your recurring services in accordance with what you guys have just agreed to with your customer. Alright, we're ready to act on this job.

KENDALL

33:26 Yep. Yep.

CHARLIE

33:28 Hello. Alright. Here's, our job page. It should look familiar. This quarterly PM is the exact same thing that we just saw on that location page. All I had to do to Act-On it was click a button and dump it into this job. Okay? It's scheduled at nine am today, that's eastern, you guys would see central.

--- Quote templates ---

CHARLIE

33:45 When you do yours. And here's, the technician assign myself, we can always add more text if we like. Coming down here. Are the two items that automatically populated here. When I chose to act on the service. These are the rules that I set up every time act on this. I want a labor line. I wanna trip charge, but you guys can make that whatever you want, whether it's a flat rate fee, whether that's a couple of porch, you know, you're going to need whatever. Now, let's jump out into the field and look at the mobile app.

--- Tech On-site ---

CHARLIE

34:12 Okay? What is it gonna look like for your types performing this work? First thing I want to show you. Is this orange band at the bottom? Notice that I'm clocked in... in route from here, I can actually send that in route notification.

CHARLIE

34:29 Okay. But let's say I'm here. So I'm gonna clock out but being in route, I'm gonna click into being onsite meeting. I'm here, I'm ready to perform. I work, take a look at these nine squares here's. The hub of where your tests are going to be. Acting. This worked out when I click on services, I can see what we're not here to perform when I click on assets down here, I can click into this generator just like we did on the office view.

--- Assets ---

CHARLIE

34:50 I can go in and see all the information about this asset. Now, I just created this asset. So we're not gonna have service history fourth or any deficiencies logged just yet. But if we did, I can click into that and see every single job that we've ever had on those generator here's.

--- Forms ---

CHARLIE

35:04 Where your text go to figure out what is the best decision I can make from my customer here. Today. Now, in terms of paperwork and inspections, what kinds of paperwork do you have your guys fill out in the field?

KENDALL

35:21 Preventive maintenance inspection form, which is just to check that. Yes, no good. Bad. All that stuff. And we've got another form is for load testing that has some calculations in it.

19038447010

35:36 What do you mean calculations?

KENDALL

35:39 Put it in the app. So then it figures out the kilowatts and your percent load simple stuff. But we need a little bit of calculations done on it.

CHARLIE

35:50 Is that what platform is that done through?

KENDALL

35:53 We do it through do forums... and then it just when they completed it emails to listen to.

CHARLIE

36:05 So that's interesting. I think we're gonna get you about 85 percent of the way there. I don't think we're going to be able to do calculations for you on our forms.

--- Forms ends ---

CHARLIE

36:14 So the... the workflow that we've got here, your tech would click view more details, surprise... surprise come to a page with a little bit more information on the job it will performing here today. And he's gonna come up here and go to our library of PDF thing. I click too fast this morning.

--- Forms ---

CHARLIE

36:32 I got a slow down. You're actually gonna come to what we call the library a PDF and he's gonna pick the right form for the right job. All of a sudden, he can pull it up on his tablet or his phone and he can click into this stuff and edit it and fill it out through Adobe. Now, we'll take it a step further, will make it a smart PDF. If you notice that we've already got some information filled in on the top, right? We can set some rules. Service trade can recognize that he's clocked onto a job when he's pulling up this form and it can go ahead and pull or some contact information, some customer information, the tech information, maybe some asset information on that generator. So when he pulls up this for me, it's just get down to business. He's not worried about the nitty gritty details of the top of the page. When he's done, he's gonna come back to the ticket right here and save this form that you just filled out to this ticket. Once he does, once he saves this, anyone in the office, you can view it immediately if they need to check it out or send it to a customer or Act-On it in some way. Now, in terms of calculations, I don't think we're gonna be able to accomplish that unless there's some crazy powers and Adobe that I'm not aware of. But maybe what I might suggest is using do forums and then they can always still just save that whatever that end result is to the ticket here on service trade and it's not gonna go anywhere. Okay? Any questions on forms before we move on?

19038447010

37:58 No.

CHARLIE

37:59 Cool. Alright. Next thing I wanna do is going to go through our quoting workflow.

--- Deficiencies ---

CHARLIE

38:05 So I want to identify deficiency and want to report that to the office. I want to get a quote made and I want to get it approved. First thing I'm gonna do here is click on deficiencies here on the top, right? We've already got a nice little history here but I'm gonna add a new one. Tell me what's a common problem you guys might quote out for a generator? Kendall?

KENDALL

38:23 Block heaters needs to be replaced.

CHARLIE

38:30 All right now, I can type out paragraph paragraphs of information here, but I think we all know that getting text to do that every time it's like pulling teeth. So instead of having to take a photo haven't, take a video haven't taken audio mode. Okay. No, I wish I had some cool little knickknack on my desk. I can take a picture of what we're gonna write this coffee cup that I've got. I'm... I'm also a big fan of the audio demo. Yeah. Let's see what we got black here. So I might take an audio mode and I might say, hey, we found a bad black, you know, that needs to be replaced. We need to get a quote out to these people today. They need to have it completed by Wednesday of next week. Don't forget to add two widgets to this quote. Okay. Now, I've got my media saved but we're for, are done service trade is going to ask them qualifying questions about this problem. First of all, what is the severity? Is this a suggested problems and fight for us? No. So I'm gonna put an opera born in the student is down and we need to act on it now. Then I'm going to associate this deficiency with correct asset. Here is where you guys start to get that Rich history. Go. Okay? This is also a great place where your tech and capture upsells. If he's out there to look at generator, 80 turns around, sees a problem, a generator be, he can notate that here associated with correct asset. Then lastly, we're going to say what's the status of this deficiency? Is this something that we just fixed? And we want to document for us? I'm gonna put new meaning we need to act on right now. Okay. Well.

KENDALL

40:07 Fixed versus verified fixes. They went ahead and replace the block cater just.

CHARLIE

40:14 Yeah. Yeah. So some people like the checks and balances, maybe a tech goes out there identifies a problem. Sometimes a service manager might go out, take a look at it before you quotes it out. And there was enough people that asked for that and that style a workflow that we ended up putting that... that fixed verified... and new. Alright, now that we have a deficiency logged, it is going to be associated with the job, it's going to be associated with the customer and it's going to be associated with the asset and you can pull it up for any three of those pages.

--- Tech On-site ---

CHARLIE

40:50 But I'm gonna come back to our job page and refresh it. We will see all the changes that we've made or that the tech has done in the past five minutes is going to show up here automatically, the smallest of which is clock events. We can see that I spent maybe 40 minutes in route.

--- Deficiencies ---

CHARLIE

41:05 I'm currently clocked in on site because I have not clocked out though. I can see that... that PM form that we fill it out is also right here ready to go. And when I click on deficiencies, there's that deficiency that we reported about 30 seconds ago. Now you guys can set up rules for whoever handles the quoting or estimating, can get an email every time and efficiency is reported. You don't have to wait on that type to come back to the office. You don't have to wait on that email from the technical, that call from that tech, that email that your quote or it gets it's gonna take them to this page and here's where all our information is waiting for.

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

CHARLIE

41:41 Here's, a link to the customer. Here's the link to the asset. Here's, a link to the job page. And here's our deficiency information or a media that are checked captured. Notice how this media is gonna follow us all the way through this process. So, I'm gonna add it to a quote.

--- Quote templates ---

CHARLIE

41:57 And just like we did with those recurring services, we have the same mindset with quotes. Take the time to make a quote first and then you can call upon it later. We call it quote templates. The idea is that you guys would go in and make a handful of templates as good starting points for quotes that you can call upon whenever you want it. So let's see... do we have one for a pair? We do not. Okay. I'm gonna try to pick a good one here. Let's see. I'm gonna... I'm gonna choose compressor here because I think it does a good job of highlighting what we can do with us. So when I don't that quote template and here's the description already ready. Okay, that we want to show our customer. Here are the items that we know we're going to need for this quote. But again, keep in mind it's just meant to save you time to get you started. It's not meant to be restrictive. So you guys can always go back and make changes or add things are taking them away. Now, if we listen to the audio memo that I recorded, I said don't forget to add to this quote because no job is complete... once I do. And once I save that noticed that our cost or revenue and our gross margin all update in real time. So before you send somebody out there to act on this, you have a rough understanding of what you're saying to me.

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

CHARLIE

43:16 No, I would like to stick to send this to you. Kendall. Let's see. I... think I've got your email over here.

CHARLIE

43:33 What I am doing right now is going and making you a contact... to give you an ideas of... of the kind of different ways you can manage your contacts. And then we give them a customer. A lot of times there's a contact who's the onsite contact. Maybe then you got somebody's paying the bills who has approval power. Okay, here's, our list of contacts for this customer. And when you pull up any sort of communication with them, whether you want to send them an invoice or a quote, you can pick from this list and send it to one or to multiple people. But I'm going to send this quote to you, Kendall. And are you had a point where you can pull up your email? I'd like to have you go through the approval process and get some audience participation here. Before I hit that send button notice, you can control what information your customer sees.

--- Deficiencies ---

CHARLIE

44:25 We definitely want to include this picture of my coffee cup for... for the... for the bad generator quotes or 50 percent more likely to be approved with pictures? We'd probably do not want to include this audio memo that we talked. Who knows what the heck detects that out there when he was reported, this thing probably best keep that internal.

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

CHARLIE

44:43 Alright, I hit that send button. You'll get an email from me. It's gonna have a blue hyperlink in it that says, click here to view and respond to quote. Click that and it'll take you to a page that looks like this. Give me a shout when you've got it up.

CHARLIE

45:07 Okay. Right here is our quote and the top left instead of this aardvark service, a dummy logo. You guys would see Mall energy, your brand, your logo coming down here's. That description that populated from that quote template. Here's. That picture we took five seconds ago. And here's an itemized breakdown. What we're asking the customer. Now, a lot of our customers really value transparency of an itemized quote or an itemized invoice. Just as many seem to really valued at one bulk price format. You guys can either at the bottom or the t's and c's again, not service trade terms and conditions, but your terms and conditions. And then when the customers ready to approve it, they're gonna hit that approve button in the top right. So hit that for me and go through that process. Kendall. Notice when you do as a customer, you have the option to give a po number. If you're struggling to get paid from somebody, you can actually toggle that field mandatory and say, hey, I've gotta have that payment before even come up there. Give me a shout when you've completed that process.

--- *Quoting* ---

KENDALL

46:10 It is approved.

CHARLIE

46:13 10 for.

CHARLIE

46:20 I think it's like a full moon or something. My internet super slow today. Alright? Now that you have approved it, we can see our status and the top right is change from submitted to approved. And I forgot a couple of new buttons that we can Act-On right here.

--- *Quote templates* ---

CHARLIE

46:34 We can take this quote with all the information, all the items, all the pictures, or the customer, all the asset information and create a brand new job or we can do the same thing that added to an existing job. We're going to be out there.

19038447010

46:47 Morrow or next?

--- *Quoting* ---

CHARLIE

46:47 Week... when I click on history, right here here's our paper trail here's. Our chain of custody for this quote. When did I make the quote? What did I send the quote to the customer? Kendall, you viewed it right here in Kendall, you approved it on this date on this time with this email address with this po number. We even have an IP address. Do you guys ever find yourself with a bunch of quotes hanging out in the void? Just waiting on approval?

KENDALL

47:15 Yeah.

CHARLIE

47:16 You guys manage that, right?

KENDALL

47:17 Now, and our CRM platform just following up that way?

CHARLIE

47:24 Okay. And service trade, we can give you the visibility of that as well. Work quote reporting page at the top. We've got a bunch of fields appear mean you can filter and sort and drill down into your... your quotes, to your heart's content. Now, I might say, I want to know what are all the quotes this year that we have sent out that have not yet been approved? So I'm gonna slap a date range on it. And I might say the status that I care about is submitted AKA not approved. Now. I'm gonna keep it open so we can get some good data, but you guys can drill down by customer location or all that good stuff here are all the quotes waiting on approval. We have six pages of and this is low hanging fruit waiting to be captured. So service trade is not a marketing platform. We're not gonna help you do those mass emails to your prospects, but in this case, you can check this box, highlight all the quotes that we just identified and resend all of them to your customers.

--- *Dispatch* ---

CHARLIE

48:20 Alright. Well, I've been talking a lot up here. I want to stop and... and hear what you guys think. Kendall, is this... is this any... any sort of this? Is... is this roof man? I'm struggling to speak this morning, bear with me. What, how does this compare? The last time you looked at service trade is the stuff that's like, you know, Jazz and you up? Is this exciting you? Is this what you're looking for?

KENDALL

48:44 I think that's good. Can we see the, I would like to, so show Tracy the dispatch fee or whatever you wanna call it calendar view of assigning jobs to text and all that stuff. What does that look like?

CHARLIE

48:59 Sure. Sure. Any questions on quoting before we move onto that?

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

KENDALL

49:04 If our customers not tech savvy in this would scare them to get an online quote. Is there an option to do just a PDF of it or what?

CHARLIE

49:16 Yeah. Absolutely. Come back to the quote page. You can print off a PDF and send it to him. Okay. Absolutely. Same with invoices as well.

KENDALL

49:25 Which does it track that in service trade or is it just an attachment that we just put it into our email?

CHARLIE

49:33 So, it would be an attachment you put it into your email service trade is gonna track the history portion if you send it out through this screen right here.

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

CHARLIE

49:42 But if you... if you print it out or... or save it as a just a PDF on a regular attachment, it's probably not gonna attract them. Okay. Alright. Scheduling and dispatch guys. I'm looking at the clock here, I had us blocked off for a full hour, probably got a hard stop time about 10 minutes past the hour or do you guys have any time constraints I need to be aware of?

--- Dispatch ---

KENDALL

50:06 No, be fun.

CHARLIE

50:08 Alright. Let's jump in when I think of scheduling and dispatch to words, come to mind. One is being proactive, the other is being reactive. So we're going to go through both here. Today. And I'm gonna start with being proactive. How do we plan in advance? So if you remember all those recurring services that we saw on that location page?

--- Recurring maintenance ---

19038447010

50:32 Gonna run a.

CHARLIE

50:32 Report here. And I'm gonna say, I want to know all the jobs that I have coming up next month for not just one location but for all my locations and all my God. So... can filter by a certain customer or region or preferred tech. But I'm gonna keep it open here so we can get some good data and we are going to pull this report for all of our recurring services.

--- Recurring maintenance ends ---

CHARLIE

50:58 And hopefully it'll... it'll... it'll load here in just a second. But my... my... my girls a little slow here this one.

CHARLIE

51:08 Think I'm asking too much.

19038447010

51:10 Of my internet right now.

--- *Dispatch* ---

KENDALL

51:22 Thank you.

CHARLIE

51:24 It is, it is thinking... while we're doing this right now, Tracy, kind of walk me through your process right now for... for scheduling and dispatch. What does it look like with your CRM?

19038447010

51:36 Right now?

19038447010

51:41 We just, we set up... reminders. We set up a job for a certain day. It could be for the same day or a week ahead of time and we set up reminders... in our pop draft system and just kind of scroll through that way. And now, you know, we can look at what's we can look at the calendar view or we can just look at the list of everything that we have scheduled and just kinda go through that way.

CHARLIE

52:15 Yeah. When you say set up reminders, is that through that platform or is that is like calendar reminders for... for Google calendar or outlook or something?

19038447010

52:24 It's it's in the CRM and our pop, we call it pop drive. Okay?

CHARLIE

52:29 Yeah. Okay. So here is or will be called service opportunities report of July. You're all the jobs we know we have coming up. Now, if I wanted to, I could click this checkbox right here, highlight all of the jobs we just identified and I can create 250 jobs at once... for me. That... that would seem to be chaos. So I don't know if I want to do that. So I might just say I want to create a handful of jobs right here... now and I can create nine jobs at once. That seems a little bit more manageable. Now, on our right side here, if we scroll down, we can get a quick snapshot of what the jobs are that we're creating what industry, what type of work is it? Okay? But I'm going to create nine jobs at once and then we're gonna act on these. But so far all we've done is create the jobs. We still have assigned a tag to it nor if we assign an appointment time to knock this out. So to do that, I'm gonna come to our map based scheduler.

Okay. Now, don't get scared off by all these boxes. Okay? These are for all the different industries that we want that we work with. So you guys would only see the ones that apply to you. But I might say, I do want to schedule for the jobs for next month. And down here, we do have some relevant filters that would be for you guys. Maybe you want ahead and you want to plan for your large jobs first, you can say, maybe I just wanna, I just wanna look at my jobs or no. We're going to make me more than... than sprinkle in the small ones around or maybe geographic area is a priority for you guys and you just want to schedule for one tack in one area, one route and you can pull with that and... and manage it that way. But for us, let's keep it open here. And here's our map based scheduling notice. On the left side, all of our technicians are listed in each one of the tax has a color coded Penn, that color is going to be important here. In a second. At the bottom, we have that calendar view. Okay? Here's, where you're going to come to see what is everybody's availability? Where you're looking at weeks ahead. I'm going to go ahead and bump it up to July because that's what we want to plan for. And then in the center here's our map. When I scroll out, we should see some pins coming up. Now, keep in mind these pins or not where your text or these pins are, where your customer location is now, notice that some of these pins are color coded. Take this blue. And right here, for an example, it's blue meaning that Jeff Smith, the technician assigned to it and it's got a couple of icons at the top one is a little calendar icon meaning it has been assigned an appointment time. The bottom one down here has a little figure head with two meaning that to tax are assigned to this. But the important thing is that this job has been created, it has an appointment time and it has a tech for all intensive purposes. This job is live and can be active. I'll take a look at these gray pins right here. We have a job created, but we don't have a tag or an appointment time. So to fix that, we just got a drag and drop, I might say, I want Eric burns to knock this job out. And now that's going to be lime green. And then I might say, Eric, I want you to knock it out Wednesday, the seventh. Maybe you can do it the other way around.

--- Dispatch ends ---

CHARLIE

55:52 Maybe, you know, you want to knock this job out on Tuesday the sixth, but a week later, once you kind of figure out everybody's schedules, you can come back and say, hey, I want my.

19038447010

56:01 Hello. How do you know who it's for who the customer is when you're so you're hands around.

--- Dispatch ---

CHARLIE

56:09 Yeah. Yeah. So you can click.

19038447010

56:11 Okay.

CHARLIE

56:11 And get a brief snapshot or you can click this and it'll take you right to the job page, if you want to dive into that. Okay, good question. What other questions do you have?

KENDALL

56:22 Is there... to see all the unassigned? Is it just on the map view? Like if we have made 20 preventive maintenance or whatever we've... we've made, we have not assigned or schedule them. Yes, another way to see that besides the Matthew.

CHARLIE

56:47 There, is it's going to be on our dispatch page, but we're going to go take a look at that here in just two seconds.

KENDALL

56:51 Okay. That's good.

CHARLIE

56:56 Yeah. What do you, what do you like about the map view?

KENDALL

56:59 Been able to pull up and see where all these jobs are and hopefully sign them in a way that makes sense? Yeah.

CHARLIE

57:11 Tracy, anything on the map view? And again, the workflow we're doing here is being proactive, any questions about being proactive with scheduling we're about to do reactive?

19038447010

57:22 Nope. Alright.

CHARLIE

57:27 Let's take a look at our dispatch board. Okay? Here's where you're going to come for that timely service call, that emergency service call when you've got that customer on the phone and you're trying to get a good idea of when I can react to this. Okay? Now, just like the map based scheduler, we've got our list of text on the left side, but this time each of them has a Lane. And all we're looking at is one day just today and it's broken down hour by... hour by hour. So at a quick glance we can see what our technicians availability is.

--- Tech On-site ---

CHARLIE

57:56 Notice it's pretty slow morning. I've got a job. Looks like dance, got a job and Brett has a job that's about it. But here's where you're going to go to see. Okay, he's probably gonna finish up with this job within the next two hours. Maybe I can bump something right here.

--- Dispatch ---

CHARLIE

58:11 Nope on a site that you were saying, let's say we've got our jobs made but know tack assigned it's. Going to show up right here. Right now. We have none because on we're... we're looking at today and everything rating was July. But here's where your... your here's where you would go to see here all my jobs.

--- Recurring maintenance ---

CHARLIE

58:29 I want to act on today. How can I best assign them? Now? They're about nine different pages from which you can create a job and service trade. Dispatch page is one of those let's say you got that customer on the phone and you're trying to capture that great information. We might search for whole province elementary school. There it is when I do, I'm gonna have some contact information pop up. I'm gonna have the street address pop up and then I can go ahead and input some information about what we need to do, check in advise on generator.

--- Assets ---

CHARLIE

59:02 Okay? Now, because we want to act on this today, I might say, okay, we're going to go ahead and do it today and we're going to do it at we'll call at noon preemptively but down here, we do require that you have an asset associated with this job. When we click on this drop-down all the assets that are already listed on discovery Oregon.

19038447010

59:22 Pop up?

CHARLIE

59:23 But here's the thing a lot of times when you're reacting to an emergency service call, the customer calling that, it doesn't know all the information. They may not know which asset is acting up. So, if you need a default, we've got location building right here. That is always going to show up right here.

--- Assets ends ---

CHARLIE

59:39 So you can use it as a placeholder. So I might say update asset info when you on sites. Once I save this job should show up, you know, on a sign bucket, knock on Wood... maybe not, you know, what this is, our plumbing scroll down there. It is... boom.

--- Dispatch ---

CHARLIE

1:00:07 And all of a sudden all we need to do is drag and drop it to the correct technician in the correct time. Now, we might see that, hey, Charlie is already. Yeah, no problem. So I'm gonna bump this job right up next to it now because we have made a scheduling decision that impacts that technicians day. That technician will get an email notification saying, hey, you have a new job. Be aware of that?

KENDALL

1:00:36 What if you don't know what day you're going to do it this year is, if it's just not assigned to a tech but you want to do it that day? Is that?

CHARLIE

1:00:47 I'm not sure. I'm... I'm with you on what you're asking.

KENDALL

1:00:51 Customer calls in and says we need to fix generator and we know we're not going to get to it today.

--- Quote templates ---

KENDALL

1:01:01 We want to create a job. Is there a way to, and we don't know when we're going to get to it yet. Yep, is there a whole placeholder for that?

CHARLIE

1:01:11 Yeah. What I would do is I would come to the location page and you can create a job and you create a service like maybe you don't want to clog up the... the works with a, with an open job.

--- Dispatch ---

CHARLIE

1:01:22 So you could create a job with the due date of next month or you could just create a one time service instead of making it recurring. You could say, I want the due date to be three weeks from now. And all of a sudden you'll get that reminder when that due date shows up in those buckets on the dashboard for pass, do jobs are coming up.

--- Dispatch ends ---

19038447010

1:01:42 Too.

--- Recurring maintenance ---

19038447010

1:01:50 But you have to put a date. You can't just create something in there. No one that something's coming up, but... you don't really want to put a date in yet?

CHARLIE

1:02:02 You, you do need to put a due date. Now. A lot of people really don't like the single day due date. So maybe you say, I know I want to knock this out sometime in July. So maybe your... your due date is a whole month before it goes past too, if that makes.

19038447010

1:02:17 Yeah.

KENDALL

1:02:19 So, is that basically setting up a recurring item? But just one recurrence?

CHARLIE

1:02:24 Correct. So, right here, this field right here is where you would denote if it's recurring, how often should the service occur for us? It's just gonna be one time because all we wanna do is just be reminded to knock this out next month. But here is okay. I want it to recur monthly and I wanted to recur every three months or annually.

KENDALL

1:02:47 So, how, okay. In the end, when we're doing like a service agreement or we're setting up a just a one time annual... preventive maintenance, it will it'll look the same as any other one time... block you to repair. That needs to happen. If we're doing searching filtering and all that stuff, right?

CHARLIE

1:03:14 Yeah. And I'm not sure. I'm with, are you talking about what language, what shows up in this job when you act on it, if it's recurring or one time?

KENDALL

1:03:21 Well, I'm just if we want to do a report at some point and see how many... in my mind, how many service agreements we happen in service trade, it would be how many recurring visits we have with customers for preventive maintenance, versus if we set something up like this, it's gonna look the same as a recurring visit.

--- Recurring maintenance ends ---

KENDALL

1:03:41 It's just happening, wants, right? I'm just wondering does that get all bunched in with our preventive maintenance? If we're trying to see what all we got going on with customers?

CHARLIE

1:03:52 Okay. So what you're... what you're trying to accomplish as you want to wrap your arms around and get visibility of here are my contract customers here's.

--- Recurring maintenance ---

CHARLIE

1:04:01 My one time customers, how profitable or these, how many jobs are we doing stuff? Yeah. Yeah. So a couple of things there. The first thing I'm gonna say is we have a tag feature underneath every asset page, every location page, every job page, or we invoice page, there's a tag where you can put your own custom, you know, didn't ocean for own custom way to filter and sort. Okay. So for all, providence elementary, I might just put... under contract. All of a sudden. You can run reports for I went to all my customers there under contract or on my jobs that are under contract or whatever tag you put there. Okay? And guys I'm gonna limit will show you one more thing but I've gotta run in about five minutes.

--- Recurring maintenance ends ---

CHARLIE

1:04:49 So I want to start wrapping up and find another time to me. But Kendall real quick, take a look at this job page and we'll give you a crash course. We can dive into this next time. But right here is where you go to wrap your arms around your business.

--- Quoting ---

CHARLIE

1:05:03 We looked at that quoting page. This should look very... very similar to that quote reporting page, but this is for jobs. We've got another one for invoices. Okay? You can drill down and sort and get into your numbers right here. Maybe you say I want to search by all my PM jobs.

--- Dispatch ---

CHARLIE

1:05:21 Okay? Maybe you do warranty, maybe you do install or whatever it is or if you want to just wanna look at your repair jobs. Okay? Maybe you want to search by customer location or technician to see how many jobs each tech is knocking out. Maybe you want to look for a date range now.

--- Dispatch ends ---

CHARLIE

1:05:38 And here's that tag feature. Maybe you want to wrap your arms around... all the jobs that have the under contract tag with it. Okay. Alright. We can dive in later. But guys, I do want to stop here and I wanna say when's a good time, we can flush this out. We have not talked about invoicing because I don't even think that's something you... you saw last time and we can dive into this stuff and... and... and answer any questions again. When is a good time that we can meet either this week or next?

KENDALL

1:06:17 Probably next week, Monday.

CHARLIE

1:06:24 Let's see you guys are Central Time. Is that right?

KENDALL

1:06:26 Yep. Monday or Tuesday for main problem?

CHARLIE

1:06:29 You know, I've got one slot late in the day. I could do like a four 30 central on Monday or we could look to them, you know, late morning on Tuesday. I could do like an 11 AM on Tuesday.

--- *Invoicing* ---

KENDALL

1:06:42 Let's do that. Okay? Because I want to do that and get into Quickbooks and all that stuff.

CHARLIE

1:06:50 Okay.

CHARLIE

1:06:54 Alright. So I've got Quickbooks list or list of priorities here... Quickbooks integration... invoicing, reporting, what else?

CHARLIE

1:07:10 All right, good deal, guys. Any final questions while we're here today? Thank you for... for hanging out with me for an hour, but anything else I can address here?

--- *Invoicing ends* ---

KENDALL

1:07:20 Not in the next 28 seconds.

CHARLIE

1:07:23 Perfect guys. Thank you very much. I'll take it easy. I'm Kendall, I saw you to do the recording to this demo so you can have that as well. I'll see you guys on Tuesday.

KENDALL

1:07:35 Thank you.

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1:07:36 Thank you.

The End