ServiceTrade Demo with Prime Specialty Contracting, LLC

Michael Menolascino with Prime Specialty Contracting, LLC dba Prime
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Participants

ServiceTrade

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Prime Specialty Contracting, LLC dba Prime

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Topics

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Transcript

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

--- Call Setup ---

MICHAEL

0:00 Good morning, Lisa.

LIZA

0:05 Good morning. My camera on. Done there we go.

MICHAEL

0:08 Hi.

LIZA

0:09 There.

MICHAEL

0:10 How are you doing today?

LIZA

0:11 I'm good. How are you?

MICHAEL

0:13 Well, I'm doing well. It's good to meet you. Now, you guys are up in the up?

LIZA

0:19 Yep, we are.

MICHAEL

0:20 Okay. Cool. And now, do you guys do all your work over there? Do you work in Wisconsin at all? What is, what kind of territory do you guys cover?

LIZA

0:28 The up of Michigan? We, I don't even know if we have a Wisconsin or mechanical license. So I think we just stick primarily.

MICHAEL

0:38 The up? Okay?

LIZA

0:40 Yeah, yup.

MICHAEL

0:41 No market's the biggest city up there, right?

LIZA

0:43 Yeah, it is. That's...

MICHAEL

0:44 Where, the university is? I think up there, right? I had a friend.

LIZA

0:47 Yep. Northern Michigan is here and then Michigan tex over in Holden.

MICHAEL

0:51 Okay. Yeah, no. So, I'm in the Chicago land area. So, not too crazy, far away. But so it's good to meet you. Now. I, you know, I went through Emily's notes. I, talked to the team and kinda got some background, spent some time looking at your guys website and what I wanted to do today, and I wanna make sure this works for you.

--- Call Setup ends ---

MICHAEL

1:13 Is I wanted to take a little bit of time just digging deeper into your current state. Then I wanted to give you kind of an overview of service trade, you know, who we are, what we do, let's take a quick look at the product and then if that looks like something you want to explore further, we'll set up time for like an even deeper dive because truthfully, I can spend eight hours right now showing you different aspects of service trade. And that's overkill, right? So I figure let's do high level overview today, figure out what's relevant. And then if it makes sense, we set up another meeting where we dive into the parts that are most relevant for you.

LIZA

1:51 Sure. Well, and I don't know if, and I'm gonna totally forget the gentleman that I spoke to I think on Tuesday.

MICHAEL

2:02 Was it Danny or Owen?

LIZA

2:04 Maybe it was Dan, but like our big thing is more on the project side because we do commercial work as well. That's kinda the big question right now. Like I know that there are a lot of different options out there for service. But my big question and kinda the deciding factor is gonna be how service trade handles the projects. And if it's able to handle the projects, that was the one thing I couldn't really figure out watching some of your YouTube videos and maybe off your website, it looked like on the service side, it was, you know, it looks like a really sharp tool, but the project side is kinda what I was more interested in seeing. So maybe it's in the notes but our projects can range from small value up to, you know, three quarters of a 1,000,000 and they can be anywhere from a month or two up to like nine months. We have another job that we're bidding right now. That could be a full year that we could be on. So we're kinda all over the place as far as project work. So those are the things that I'm more concerned about making sure that the software would be able to still part in. With those, it would be subcontracts purchase orders, job costing information, with a detailed... estimate that would be coming over just kinda your traditional job costing for a project that's what I really wanted to see if the software or your application is able to handle.

MICHAEL

3:46 Yep. So we have, so to give you some background service trade was founded with the goal of working with mechanical contractors and fire protection contractors that's our world, right? Like that's the world we live in, you know, H, vac, mechanical contractors, commercial service. And primarily we work with commercial customers. Now, we have customers that do residential work, but we're built with commercial in mind. And what I mean by that is things like recurrent customers, you know, in the residential world, you often see a customer and you might not see them again for five, 10 years, right? Whereas in the commercial world, you have preventative maintenance agreements and recurrent work. And, you know, there's a lot more of that ongoing relationship, ongoing work. And so we built our system with that in mind, right? So that's why we say it's built for the commercial side in the sense that not that you can't do residential through it, but we built it with commercial customers primarily in mind.

LIZA

4:45 Okay.

MICHAEL

4:46 We released some project management capabilities starting last year and have built them out. And we actually just did our formal launch of the project management capabilities. The full suite of project management capabilities. Now, what we'll tell people is if you were a Construction firm that's primarily doing two three, four year large, you know, multi 1,000,000 dollar facility build out as the vast majority of your work, we're probably not the best fit. Not that, we can't do it. It's just that there's things that are built specifically for that. Our project management is really built for our customers that do a lot of service work. But then they say, yeah, but our Construction division does three months, six months, nine months projects and that's what we built. So it sounds like that's kinda the range you're in where you have these one year and under type projects.

LIZA

5:39 Yeah.

MICHAEL

5:40 You know, 1,000,000 dollar an under type thing. So we absolutely can do those. And we have a tool that you could create your budget. You could do change orders against that budget on the project. You could, you know, track where you are, what percentage complete, you can have multi phase projects. So we'll walkthrough that. So we'll talk through that. And what I'll also do is just because, I know we won't have time to do that full service. I'll also send you a link to a recent webinar we did about the project management features. As that way we don't use the whole call just on the project management side. You know what I mean? We can kinda do that high level overview. And then I'll also provide that project manager webinar.

LIZA

6:23 Perfect. Okay.

MICHAEL

6:25 Perfect. So tell me a little bit. How many guys do you have working on the Construction side? Because I, my note said you had 10 on the service side plus five loaders.

LIZA

6:38 I think it's somewhere in between about like 20 to 25... that are on the project side. I've been here for about six weeks now.

MICHAEL

6:49 I...

LIZA

6:51 Yeah. And I was specifically hired to kinda get them up and running on a job costing platform. They're just running strictly out of Quickbooks right now and then job or over on the service side, I come from a general contractor background, and I've been doing job costing for pretty much my entire career. So, so I come from, I come from a GC background. So... but they, so, yeah, it's like it's about 2025 and then it's at least 15, like 10 primary guys on the service tech side with five helpers, guys do float back and forth between service and project, but I would say that those are kinda the primary numbers.

MICHAEL

7:38 Okay.

MICHAEL

7:43 Just jotting notes. Okay. And help me, you know, you said they're using Quickbooks, they're using excel sheets. I know what are the like main challenges? You know, you got brought on to solve a problem. What is the pain that's being felt that you're solving?

LIZA

8:00 They don't know month to month, how they're doing on jobs. It's at the end of the year, it's money in minus money out.

MICHAEL

8:10 That's a big brown. Okay. So you really need something in place soon.

LIZA

8:16 We desperately need something in place. We basically have a bookkeeper on staff. And then we do have an accountant who handles, you know, going through some of the reports and making sure that things like sales tax, use tax are paid. He handles our, the payroll and everything. So, like from that aspect taxes are getting paid correctly, payrolls handled the union bills are getting paid, bills are getting paid, things like that are getting paid. We're not, we're not, but.

MICHAEL

8:47 The bills, but the problem is you don't know how you're netting out until the end of the year.

LIZA

8:51 We know that we're profitable year to year. We just don't know which like division is profitable. We don't know.

MICHAEL

8:58 Jobs are profitable. We work is worth doing.

LIZA

9:01 Don't know if services profitable. We don't know if jobs are profitable. We don't know overhead costs. We don't know any of that information. So.

MICHAEL

9:09 On the service side, you guys do PM agreements?

LIZA

9:13 They are just kind of starting. I believe that they have maybe a handful of clients, but that is something that they've talked about and they would like to develop that a little bit more kinda have some steady customers, to do that.

--- *Pricing* ---

LIZA

9:31 We also because of the commercial side and some of these clients, they are trying to develop some of those clients into... service? Yeah, service agreements.

MICHAEL

9:45 How do we get a project stood up and then set up a PM agreement thereafter, right?

LIZA

9:50 Yeah, exactly.

MICHAEL

9:52 Well, and then the reason I asked about PM agreements specifically is once you start doing PM agreements, PM agreements typically aren't high margin, right? They're not that's not only where you're making the money, it's the pull-through revenue on those PM agreements, right? It's the, I was there changing some filters and identified a repair opportunity and we capture that pull through revenue. But, if you don't have good ways to measure that, it gets real dangerous to start rolling out PM agreements because you're rolling out a bunch of low margin agreements?

LIZA

10:23 Yeah. And if...

MICHAEL

10:24 You're not tracking like where you're actually capturing pull-through...

LIZA

10:27 You...

MICHAEL

10:28 You, you're gonna leave money on the table? Okay?

LIZA

10:31 Like I'm getting asked questions of like what will we be able to track call backs? You could?

MICHAEL

10:38 Yeah. Okay... perfect. This is all very valuable to know. So let's do this. I'm gonna... so Danny was originally gonna run this meeting, but, he ran into some car issues and called me and said, can I, so to give you a context, of the setup here? Danny and I are a team. We both cover the midwest. We work hand in hand. We share quota. We share all that I'm in the field. He's on the inside meaning I'm out there on the road most of the time going, getting on site looking at the inner workings of how you guys operate really digging in, you know, figuring it out and kind of helping our customers out that way. Whereas Danny is normally the one in his office running these first meetings. So, I mean, obviously, I run first meetings as well, but it's just to give you context of, you know, I know you spoke with others, and, you know, you're probably like who is this new guy that showed up on the invite this morning? So I am, but I partner with him. We talked he called me this morning. He was like, hey here's, the situation. Are you at home today by chance? And I was like, I am, it works out perfectly. So, so let me, I'm pulling up slides and you're not seeing my screen. So let's do this. Do you see my screen?

LIZA

11:56 Yep, I do.

MICHAEL

11:57 So we're gonna do super high level overview, just a couple of slides and he, we're gonna dive into the platform itself because I feel like it's always easier to understand things when you're seeing it in reality. That being said when we dive into the platform today isn't going to be sort of a full demo of like step by step each piece. We're gonna kinda jump to some key highlights, right? And then, but I wanted to be conversational and if we get detour that's fine. We could dive into whatever piece we want to dive into. So as I mentioned on the front end goal here was to better understand your guys current state which you've helped me out with quite a bit. Thank you. Give you a quick overview kind of a live look at the system as well and then schedule whatever next steps, you know, sending you the project management, webinar, setting up maybe time, to really dive deeper into specific fic aspects of service trade. So, like I mentioned, we've been around over a decade. We have over 1,200 customers. Those 1,200 customers manage over 13,000,000 distinct assets through service trade, assets, being the equipment they work on. And over seven point 5,000,000,000 dollars of revenue has been invoiced through service trade. Meaning our customers have invoiced seven and a half 1,000,000,000 dollars around through the system. Now, to be very explicit service trade is everything from... you know, signing up a new customer to start doing service work for them all the way up. Some of our customers like to send invoices through service trade. But we are not an accounting platform. At that point. We want to pass information through to your Quickbooks or whatever other accounting system you're using and let accounting do accounting. Does that make sense? Lease? Okay. Perfect. So when we look at service trade, what do we want to help our customers do it's? Really two things, control costs, grow revenue because guess what that's how you run a business. It's rolling costs and growing revenue that's universal to any business I've ever encountered.

--- Pricing ends ---

MICHAEL

13:56 Those are the two things you have to do, to be more successful. So when we talk about controlling costs, it's about helping you. This is the downside of working from home. I got the dog.

LIZA

14:10 That's perfect.

MICHAEL

14:11 Apologies for that.

LIZA

14:13 It's okay.

MICHAEL

14:14 So, we talk about controlling costs. We're talking about improving efficiencies on the office side of things, how do you get information to flow? How do you track what's happening? How do you make sure that you're getting the margin you need on your jobs? The other part of that is setting up your text for success. Your text are hired because of their skills in their trade. The more time you spent have them spend doing admin work, the less valuable they are, right? You know, they're not hired to be admins. And too often, what we see with systems is they shift, they just shift the burden from the office to the tech. And if you're just shifting the burden from the office to the tech that doesn't really help anything, right? Then we also want to help you grow quality revenue. And what we mean by that is how do you win more service agreement? How do you capture pull-through revenue? How do you win more projects and grow profitable customer loyalty? We, we are big believers and helping you guys deliver a top tier experience to your customers. So when we think about the service trade platform, we really can think of it as like these aspects, we have the office coordination, which is all about scheduling a dispatching, make keeping up on what work needs to get done, reviewing what materials are used, understanding costs. Then we go into the technician side and that's all about giving them the tools to do their work more efficiently, right? Capture what they're doing, log the materials they're using customer communication. Though. Is that third pillar? And this is that idea that we want you to be able to have more positive touch points with your customers. Too often contractors touch points with customers are one when they get the phone call that something's not working. They have to go, you know, hey, we need to go fix this. And two, when they call the customer back to ask for money, right? They're two maybe less than ideal moments. So how do we create more positive touch points with your customer? And so that's where we have our customer portal and our service length that will go into. And then through all this, we want to give your management team visibility. How much have we incurred on this project so far against what we budgeted, right? How, where are we at on this? Does that make sense?

LIZA

16:30 Yeah. So, and maybe you'll get into this so you can tell me, to just hold my horses, but it's interesting. You bring up like customer communication because that is like a big sticking point for our service department. They like the built in feature with Java that you can communicate. The one drawback that I saw with it is that you can't tag it to a specific like ticket and maybe that's not realistic but, or work order, but it appears as though you can at least have it at the customer level, but it's a texting capability right through Java. Is that something that you guys have?

MICHAEL

17:13 We don't have a texting. So I'll show you what our customer interface looks like. It's it's...

LIZA

17:17 Okay.

MICHAEL

17:18 I would say it's more robust than that because it is job specific and it gives customers full visibility into what, you know, the level of visibility you wanna get, what work's been performed? Do you want to give them let them know when your guys are on route? Do you want to, you know, so we'll walkthrough exactly what those options look like.

LIZA

17:34 Yeah.

MICHAEL

17:36 That's good to bring up. I'm glad you brought that up. Let me ask you one question. Just circling backwards for one second. What, what are you guys using to build? You know, you mentioned you have a big project that might be like a year long project that you're currently bidding on. What are they using right now to build out those proposals?

LIZA

17:56 Word, we use... fast pipe for take off, and then that is a fast pipe in fast dock, and then just some excel spreadsheets that they have developed for take off.

MICHAEL

18:16 Okay. Yeah.

LIZA

18:18 And then it's a word proposal that they then put together with all of their, you know, exceptions and everything that then gets submitted to the general contractor.

MICHAEL

18:28 Okay. Good to know. The reason I asked that is because the last piece of the puzzle sales success. So we acquired last year, yeah, last year, a company called, Northboundary had a very good proposal tool for both project proposals and maintenance agreement proposals. And the focus of that tool was how do we, how do you put together proposals quickly efficiently in a standardized way across the team, track them, get visibility into what's out there and how they're going. And so we picked up that tool called Northboundary as well. So now we have a tool that actually helps with building project proposals and standardizing those. And, we can take a look at that at some point as well. So so that's just, I get another tool we picked up. So I just want to switch over. So here's service trade here's, the ServiceTrade dashboard. I'm logged in. I'm you're able to split it up into whatever offices you want. Offices don't need to mean physical locations. You can have an office for your Construction guys and your service guys, right? It's however you want to group things. So I'm logged in and I could quickly see what jobs I have scheduled for today. So we've got one PM job scheduled for today. I can see overdue jobs that need appointments. I can see stuff that's do in the next two weeks. When we talk about jobs here, this is any type of work. This can be for example, right here, a PM job or this one right here is a project job. So you can have either of those as the type of work, you know, that you've got that you're seeing those both fall under jobs. Then what we do is we have companies, refer to your customers, you know, who's my Bill to and locations are the physical areas where you're doing work. So maybe in some cases, your company might be a GC that you're doing work for, right? But the locations under them are the physical locations where you're servicing. And then once that's location is stood up, maybe you get a PM agreement with them. And now you have a new customer, but that location will float over. And then we look at a location, just look at grow in the got as a restaurant here in Chicago. If we look at just this location, what you'll see is we have the full list of the assets that we work on at this location. And then if I go into any of these assets, I can actually see a full history of all the work we've done, right? So I have a full asset history here. Take a look right here. I can see all of the historic jobs that have been done on this asset. And I could then drill into any of those if I wanted to see exactly what happened on them. I can also see a record of any repair opportunities and what's been addressed and what hasn't so like right here, we can see this was an old job that was done on here and I have the full visibility to what happened. Including the paperwork, any pictures, comments from the tack, anything like that makes sense so far?

LIZA

21:36 Huh. Okay. One question I do have.

MICHAEL

21:40 Yes.

LIZA

21:40 And it's more, can I just see it back on that initial dashboard you showed jobs I think to be invoiced? Yep. Okay. That is something that Jobber does not have and the service group has to keep a separate spreadsheet and it drives me nuts. I believe that a service tool should be able to go. Okay, the call is complete. Now, put together the invoice?

MICHAEL

22:12 Yes. So, let's actually do this. Let's walkthrough. So, I have this job scheduled, let's walkthrough this job start to finish together. So you can see it from what the office has, what the tech sees and then how it comes back to the office waiting to be invoiced. Do you want to do that?

LIZA

22:29 Sure.

MICHAEL

22:30 Perfect. So just gonna close this because I don't know where this is. This is what happens when I open too many tabs. I apologize. I, to close that now to find here. Let's close all these. Let's open this PM job that's scheduled for today. So if we take a look at this PM job, it's at gone, got, we can see the parent, the Bill to is here. I can see primary contact for the job. I can see other contacts and I can see the work that we're here to perform. So it looks like there's three rooftop units I'm here to do PM work on. And then here's the three assets that I'm dealing with. And here's the materials time and labor that are anticipated for this job. So it pulled in, the terials, time and labor that we think we might need. And then you'll also see there's a comment here that says gate code is one, two, three four and bring a 20 foot ladder. So that comment is logged at the location level. So anytime anyone goes to this job site, they're gonna see this comment so that they know, we can also have comments at the customer. There's a customer level comment that says don't go on site, without a po in advance or a, not to exceed 10,000 dollars or whatever it might be. So you can create those comments at the level of the customer, the location, the specific service, or even the specific job. And it sorta cascades so that any time you know, you're dealing with that customer, you'll always see it.

LIZA

23:57 Okay.

MICHAEL

23:59 So here's the job we're gonna work on. So from the office view, it's been scheduled for today, eight hours. And we have one tack on that. If we had multiple tax especially when you're dealing with project work, it's probably going to be common that you have.

LIZA

24:20 I think you might have froze.

LIZA

25:10 Okay.

--- *Call Setup* ---

MICHAEL

26:08 Hello? Can you hear me?

LIZA

26:09 Yeah, I gotcha...

MICHAEL

26:11 I don't know what happened there. My Zoom closed it. You said you said, I think you might have frozen, but it was still connected for me at that point. And then Zoom was closed out and I was like, okay.

MICHAEL

26:32 Sorry. So, yeah. So here we see the job that we're about to do. I'm actually going to switch this over. I don't know why I just switch back to the screen share because I'm actually going to switch this over right now to the technician view. Let's see what the technician sees on this exact job.

LIZA

26:47 Okay.

MICHAEL

26:49 And again, this job, this one happens to be a PM. This could be a PM, this could be.

MICHAEL

27:00 You know, when your iPad starts telling you it's time to update and you're like, no, no, no, just delay just.

LIZA

27:04 Yeah, just hang on.

MICHAEL

27:07 Okay. Right now, like I know you want me to.

--- Call Setup ends ---

LIZA

27:12 But on laptop last night, you have a BI or update?

MICHAEL

27:19 I give you like, no, I don't need to like, it doesn't need to happen right now.

LIZA

27:23 Hold on.

MICHAEL

27:25 Okay. It loves to pop up. So there we go. Now, I'm in here. So you're seeing my I'm just reloading the appointments on this. So here we go. This is the technician. I can see the jobs I have scheduled for today. I just have this one job today. If I wanted to see, you know, my schedule for a longer period of time, I can filter the today on the view. So when I dive into grow go, this is the job I'm going to do. I can see where it is. I can get directions to that job if I needed to. So if I hit the directions button, I'm able to get directions. I can see if there's other text assigned to this job and what kind of work it is. You know, I can see, you know, if there's a salesperson associated with this account, a project manager, whatever it may be. I can at a glance see what services I'm here to perform. I can quickly see parts of materials that we anticipate on. So if, I know, I'm gonna need 12 filters. Do I have 12 filters in my truck today? Right? If I don't have 12 filters, there's a problem. I can take a look at the assets I'm here to work on and can actually dive into the service histories of those assets just like we could. From the office view. I can see the contacts related to this account and send them emails or call them as needed from right here. So I could see contact related to the location or to the job or to the customer, whatever level we'd like. And then again, there's that comment to bring the ladder and in the date code. So I have some basic information right there at my fingertips. And it's meant to be super easy for me as a tech to know where am I going? What am I doing? You know, and who do I need to contact if there's an issue? So I'm just gonna clock in is on route to this job.

Now, one thing I do when I clock in as on route, I can actually notify the customer. So if I wanted, I could notify the customer and say, I'll be there at 940 and send them a notification. So then they'll get a notification saying, you know, your technicians on route, he'll be there at nine, you know, 45 or whatever time it is. I'm actually just going to pull this up so we can see what that looks like right after this.

MICHAEL

29:44 Then… additionally, as I'm a, I'm gonna clock out of being on route, I'm gonna, and it's gonna automatically clock me in as on site. So I'm now clocked in as on site. Now, right now, are there situations where you ever need to get free work authorizations or sign off work acknowledgement type things, your text, you know, from site contacts or anything like that?

LIZA

30:14 Not that I'm aware of, but there are times where we do have some maybe difficult customer. So it's better if we can get sign off on something.

MICHAEL

30:24 So we do have you'll see two buttons here. Pre work authorization or work acknowledgment basically pre work authorization is, hey contact, can you just review that? This is the work we're here to perform for you? Here's? The materials and parts I think I'm gonna need and can you sign off, right? So that's pre work? Similarly, we have the work acknowledgement, which is the post work equivalent. Now, you don't need to use these. We don't even need to have them showing up. It's their options, right? That you can configure and use as needed. So, as a technician, I'm gonna go through and let's just say I'm looking at rooftop unit one. I know what I have to do here. I can mark that it's been completed. I can log a comment… just gonna log a quick comment there. Done then on rooftop unit too, you know, obviously I'm going much faster than any person could actually go. I'm gonna take a picture for example, so we could grab pictures, videos, audio recordings, whatever it may be… to enhance these, right? To log what's going on. All good but getting old. So I can log whatever notes I want as I'm performing my work. We also have tools that provide forms to guide folks through tasking and things like that. If there's interest in that. But as we go through, we do the work additionally if I'm on this job and I know shoot I had to use… you know… extra foot of this pipe that I wasn't expecting to use, I can actually log those additional materials consumed. So that when you're understanding this is especially important when you're on a project, right? We need to track what's being consumed. So you understand how you're performing against budget, right? So I, as attack, I could quickly and easily log what materials I'm using. I can also say, for example… let's just add and have any of these in my truck. I can also log for example, hey, I grab this from over at home depot on po, number… five four six, four two. And I received it. So right there, it's just another way to quickly easily log materials that are being consumed to make sure that nothing's falling through the cracks. Do, do you know if they currently have any challenges with getting guys to log all the materials consumed?

LIZA

33:08 I'm not, I think, yes and no, some of them I believe are good about it. I'm not sure if they are taking photos of stuff and attaching them inside of Jobber or if they are simply making… they have to be because they're using that detail sheet. I don't think they are having trouble with it. Yeah, I would say though it may be a challenge on the project side because it's not a process that they are currently doing. It is an expectation though for whatever we come up with.

MICHAEL

33:45 Okay, perfect. Yeah. So we're always going to be able to, you know, record those job items. You could even record materials that you ordered that haven't yet been received. So then the office could then keep track of, hey, these are jobs where we're waiting on parts to be delivered. And that way you run that report as soon as that part comes in, you could re, dispatch that job.

LIZA

34:03 Okay.

MICHAEL

34:05 Attack. We're just gonna say, hey, you know what? I've done this. But the one thing that came up is as I'm working on rooftop unit three... I realized that I'm changing the filters on this but I say... this compressor has gone bad, compressor is busted, right? And then I could say, you know, what? Let's take a picture of that will take a picture of this nice tree... compressors busted. And I could add that as well. And then I just say, you know, what the system is inoperable, that's roof top three and it's a new deficiency identify. So I've now logged a deficiency on this job repair on unity, right? This is where you're capturing that pull through revenue. But other than that, I did finish my PM work here and I save. So I've now gone through completed my work as attach, you know, maybe I need a work acknowledgment that I want them to sign off on. I can do that, but I'm gonna clock out now... actually before I clock out, I'm gonna show one other thing. We can also let's say there's refrigerant tracking forms they need or things like that. It's very straightforward, for a tech for example, to grab a refrigerant tracking form, which is what I'm just loading right here. And then these become fillable PDF. So I don't know why it's taking a minute to generate... these become fillable PDF. So I have this right here.

MICHAEL

35:45 Pop it up an Adobe. But the key thing to note here is look what it did. It's pre populating with the job information, the customer information. So we could pre populate with asset information even so we see what asset we're talking about, what customer date time, all that. And so I can just go through and, you know, so, you know, I'm just checking off random boxes here. And then as soon as I'm good, I just send it right back into service trade. And so what that did is it allows me and we can create...

LIZA

36:19 Rules.

MICHAEL

36:20 For the paperwork. So for example, service rate as a rule in this demo account always have refrigerant tracking form available. But you could also have a rule saying only provide the tasking checklist for a rooftop unit on jobs that have a rooftop unit, right? So you're not seeing things that are unnecessary, full logic that we built out there. So now as a tech, I'm gonna clock out, I'm gonna say I did all my work, continue clocking out, leave a comment on the job, completed all three units. So you'll see that it's also gonna put some barriers up. Hey, did you take a photo of the work you did? Did you leave a comment? Did you find in recorded divisions? You can turn those on or off as you see fit, but, you know, we have them on to just highlight that. So as a tech, I've now completed my work, I've completed the job. So going back to the office view.

MICHAEL

37:24 Before we go too far further, I do want to show you this is what it looks like when that on route notification went out. So they get a little who's coming when they're on their way. So, but here's that job we are working on right here. The reason we did this full, I want to show you how this looks and how it gets to an invoice. So the first thing that's going to happen is when we go back to the dashboard, remember we have past jobs to be marked completed. So, right here, this job is still considered in Progress even though the tech has said they've completed the work. The reason for that is just for you at the office to put eyes on this, someone to just say, yeah, looks good, right? The other thing is when we log that busted compressor on rooftop unit three... it generates... a, it generates an alert immediately to your sales team, your project management team, whoever it may be that there's a new repair opportunity, efficiency. And so right here, we see, okay compressors busted. I can see the photos that were taken and I can quickly turn this into a quick repair quote. This goes back to that ability to capture pull through revenue. I can say, great, let's turn this into a repair quote. Now, I can manually add the parts and materials. So I could say it's gonna be we're gonna Ned... 12 hours of labor and we're gonna need... and I'm gonna need a compressor, right? I could manually add all that or I can quickly and easily apply a template. So we can, you could create templates for anything you use regularly. So compressor replacement. Now, I do those a lot. There we go plugs in my labor, my materials, my parts right there, as well as a full job description. And now I can send this quote out to the customer. I could include the photos from that we captured. And I'm gonna show the total price. And now it's going to happen here... is your customer gets alert, you sent a quote. I can view and respond to that quote. So when I pull up this quote, my internet is real bad. I pull up this quote. I can see it's from, you know, it'll be branded with your logos, things like that, what work it is pricing photos, you know, to help reinforce it. I could request changes or I can approve it. And one of the cool things that's happening here is we actually track their interaction with the quote. So I could see when they viewed it. I could see when they opened it and what's important there is that allows me to do things like, hey, I. Wanna know just as an example, I wanna know anyone we've sent quotes to in the first say, two weeks of the month... that they've never even looked at.

LIZA

40:28 Okay.

MICHAEL

40:30 And so now I got, okay, there were four of them. Great. I'm gonna click this and I could resend them all just wanted to get this to the top of your inbox... and I could resend that to all of those customers right there. I can also for example, say, hey, let's look at ones that we've submitted that they looked at but didn't approve. Well, there's two of them. Well, this tells me these are ones that maybe I should pick up the phone and call and say, hey, did you have questions or concerns with that quote that I sent over? Does that make sense? So, so we are tracking that. And then once this customer with this quote, customer approved it... it'll show up as approved on our side. Approved. We can see when they approve it as you can see. And then I could just create a job or added to an existing job right here. And I could even make it a project if I wanted. We'll say it's do at the end of the month. So I could turn this into a project. And the big difference with the project is that it allows you to create a budget. It allows you to do change orders. It allows you to track work in Progress, things like that, you know, what percent done? Are we, things like that? So going back to our PM job, however... the job that's been completed, I in the office say great. Complete job. So I go, yup.

MICHAEL

42:06 I am so slow today. My internet across the board iPad was going bad too. Here we go. Job is completed. Now, it's waiting to be invoiced. A couple of things here. One, I can invoice the job, but I first want to the service link. So the service link is something we could send to the customer will send this one. And if we take a look... at the quote approval, here is a service link. So we take a look at the job details and the customer is able to see, hey, what work was performed for us... what services, what materials and parts comments that they've made, you know, that you made visible to them pictures, documentation, repair opportunities that were identified, even timelines, if you want of when guys are clocking in when work is being done. So you're giving your customers a full understanding of what it is you're doing for them, right? And then we want to invoice the job. We're gonna hit invoice and I'm gonna say, you know, what these two parts shouldn't be under no service. They should be part of this... which contract is relevant to this customer.

--- Pricing ---

MICHAEL

43:19 So you can have different contracts with different pricing rules and mark up rules. So I'm gonna say, you know, what? This one looks good, date that six because it's letting me know that I, under price that... I can see if there's any items that we don't have a cost in there. Maybe it's stuff that we are waiting on, P invoices from. But now, what's going to happen is... we now have all of these items... in here. I can choose how I want the customer to see it. So I could group it by if I did multiple services or I could say brand total only or just summarize by line type, which is what I'll do here. You'll see it's calculating the tax based on where the customer is. And then I'm able to send the customer this invoice right? And so I could send an invoice... we'll send it to here... and again.

MICHAEL

44:27 Where is my invoice?

MICHAEL

44:33 There we go. So invoice comes through. Yeah, my internet is just awful right now.

MICHAEL

44:43 There we go. So invoice comes through. They get it as an attachment. They can also view it through their browser... and then they could say, for example, go to service details and that's gonna take them to that same service link that lets them know what it is that you're asking them to pay for. They get the summary. They get the terms, all of that. So, so that's kind of the full loop to an invoice of just a service call that we had scheduled for today as an example real quickly and that's where we would. And we don't do anything beyond that invoicing stage. At that point. It's you know, your accounting software because that's counting is back off at that point. Let me just look here's. A project. So I just, this job is marked as a project. So I do want to just highlight a couple of the project capabilities, the new job view here. So when we look at a project here, we'll see that there were, you know, you can you're gonna have, you could have multiple appointments, multiple tax, things like that on either regular. The one off jobs or projects where projects differ is that you're going to have start dates and dates. You're going to be tracking what percent complete you are? You're going to have a budget? Typically, I don't know why this one doesn't have a budget. But when you create a budget... let me find one where someone actually put a budget in their job. That doesn't make sense?

MICHAEL

46:14 So got a name, a job project that will have good stuff. I'm pretty sure I have one to have it.

MICHAEL

46:35 I don't know why this repair was marked as a project, but it's one that I can mess with. So if I wanted to create a budget on a project... I'm gonna add a new budget and so I can build out my budget... from all the existing job items that are on there. So I just made a quick simple budget, right? Very little on here. It's in draft mode. I can add additional items, whatever it may be. I can edit my budget, I can say.

MICHAEL

47:09 And... and let's just call it 10,000... to 10,000 dollars there, right?

MICHAEL

47:26 So I can set this up however I want. I'm just building out. This is just a very random one. And once my budget is good, I can lock my budget and then once my budget is locked, I can always create change orders. I'm also then able to let's return to the job, really quick... track performance against my budgeted plan.

--- *Pricing ends* ---

MICHAEL

47:47 So I can see what have we invoice against what we've expected? What costs have we incurred against what we've expected? You know, we can track all of that. We're able to then... pull these two. You know, you could deep dive into the performance, see what parts have actually been consumed against plan and track all of this. I could view it by item type. I could view it by service. I could do it by quantity or dollars and you could really drill down and kind of manage what's going on with that. And like I said, I'll send you the full project management webinar, that kind of walks through this in detail. But I know that was something that was important to you. So I just wanted to make sure I highlighted and touched on it at least a little bit here. So, but

I'll send you that webinar. So overall, just based on our conversation so far, what are your thoughts?

LIZA

48:39 I definitely like it for the service side, I don't know if it's gonna meet the needs that I have on the project side.

MICHAEL

48:48 Let me, like I said, I'll send you the PM webinar. I think that will be the thing that lets you know if it's sufficient or not.

LIZA

48:54 Yeah.

MICHAEL

48:55 So I'll send that your way. Additionally. I would like to dive. The other thing I want to touch on. We didn't really get into it... is Northboundary, which is the proposal tool that might be helpful for your team. So what about this as a next step? I'll send you the project management webinar. You can review that, see if that looks valuable.

LIZA

49:20 Okay.

MICHAEL

49:21 I'm actually gonna be in northeast Wisconsin next week. So if you happen to be available next Thursday, I'd be glad to set up some time to come by and we kinda dive a little deeper on some of these elements. I don't know what your schedule looks like next Thursday.

LIZA

49:43 I might be able to be, I'm gonna be just getting back to the office after three day seminar. Yeah. So yeah, I might be able to carve out some time... yeah... but I guess I do have one question for you. So... because, I do really like the service side but I am looking for, I need, I desperately need accounting. And one of the programs that I have been looking at is foundations. Can you tell me how you guys integrate with Foundation is?

MICHAEL

50:26 I will send you the, along with the PM webinar. I will send you our documentation on the Foundation integration, the one we work with regularly. So.

LIZA

50:36 Like, is that like a smooth thing where if we are using service trade on the service side, I don't have to keep using, got Quickbooks to push everything into

Quickbooks and then push it into Foundation. I would love to eliminate Quickbooks.

MICHAEL

50:55 So, so, yeah. So for let's just pull up the Foundation document right here. The internet might as well not. I need to call me after this because I can't get anywhere in even like Google right now. This is crazy.

LIZA

51:17 And that's okay. If you wanna follow up, it's just, I was hoping for a full ERP, but the surface is kinda proving to be my challenge right now.

MICHAEL

51:28 I actually have, hello, thank you for taking the time. It's a video. Basically, I'll send you this. We have documentation and videos, kinda talking through. So the way we do it is it's we use our service trade accounting connector, which allows you to basically have the info, Paul right out of service trade and moving to Foundation directly don't need to go through a middle man step and, you know, we can do that. The ones that we, the systems that we seamlessly play nice with are things like Foundation, Sage, intact, Sage, 100 contract or Computerease. I think we have one with pro core, but I don't quote me on that I have to verify, but there's like five six that we've already, you know what?

LIZA

52:17 Okay. So Foundation is one of those?

MICHAEL

52:20 Yes, Foundation. Yeah, I have literally we won't watch it, right? I'll send you a link.

LIZA

52:26 Okay.

MICHAEL

52:26 All we have a video on service trade to Foundation accounting connector.

LIZA

52:32 Okay.

MICHAEL

52:32 Yeah. So I'll send you not just the video. I'll send you there's actually a document that I think is cleaner. It's easier to read a document sometimes.

LIZA

52:43 Okay. And is that?

MICHAEL

52:45 I'll send you that?

LIZA

52:47 Is that something that you guys would handle then? Yeah.

MICHAEL

52:51 We use the orchestrate accounting connector. So just give you an idea here.

LIZA

52:57 Okay.

MICHAEL

52:58 This is, this is like the quick overview sheet of just how information flows like in the most standard setup.

LIZA

53:09 Okay.

MICHAEL

53:10 Does that make sense? Yeah. So it's pretty straightforward. Yeah.

LIZA

53:19 Okay. That's perfect.

MICHAEL

53:21 So, what I'll do is I'll give me 30 minutes after we get off this call to compile some documentation, final link to that project manager webinar, get all put together. I'll send it over your way, give you a chance to take a look at that, get your thoughts.

--- *Next Steps* ---

MICHAEL

53:33 But like I said, yeah, Foundation connection is not a problem. And then what I'll do is maybe follow up with you. Well, you're going to be at that show Monday, Tuesday, Wednesday. So, what if I shoot you an e-mail late in the day tomorrow? And just see if it makes sense for me to swing that way on Thursday, kind of swing up to market because I'm gonna be, it's all day, Wednesday. I'm going to be in northeast Wisconsin and I can either stay up that route or head back.

LIZA

54:04 And I'm connecting online. I know we're kind of out of the, so that's no worries.

MICHAEL

54:09 Yeah, but that's why I was thinking like, man, the timing is great because I'm already could be right up there, you know, I...

LIZA

54:14 Yep, sure. Yeah, I mean, Wednesday, I'm wide open and we're here seven to four Eastern Time. So work for you yep.

MICHAEL

54:24 Let me, let me send you like my actual availability. Okay, say, hey, this is what works. This is what doesn't and then we'll coordinate a time that way. So I'll include that in the e-mail follow up from this?

LIZA

54:34 Okay. That sounds good.

MICHAEL

54:35 Perfect. Well, I'll send all this your way, like I said, give me 30 minutes to put it all together and I'll send it over and we'll go from there.

LIZA

54:42 All right. That sounds good.

MICHAEL

54:43 Perfect. Have a wonderful day.

LIZA

54:45 You too. Michael. Thank you. Bye.

The End