ServiceTrade Demo with TPC MECHANICAL

Sarah Pittard with TPC MECHANICAL
Recorded on 7/22/22 via Zoom, 54 min.

Participants

ServiceTrade

Sarah Pittard
Territory Manager

Gino LaManna
SDR

TPC MECHANICAL

Kris Wainscott
Service Manager

Other

IPhone

Aaron York

TPC Service

Topics

Transcript

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

--- Call Setup ---

KRIS

0:00 Hey...

SARAH

0:01 How are you guys?

KRIS

0:03 Good. How are you?

SARAH

0:04 Good. Is that Aaron and Kristopher?

KRIS

0:08 That's right?

SARAH

0:09 His...

KRIS

0:11 That's Aaron gross.

SARAH

0:13 Hey, Aaron.

KRIS

0:15 Hi.

SARAH

0:15 Nice to meet you guys. Are we waiting on anyone else to join or is it just gonna be us three today?

KRIS

0:21 Hey, we are waiting on one more see here. See what she's really not gonna have time.

SARAH

0:31 Yeah, no rush, Aaron, you're the service manager, operations manager over there. Is that correct?

KRIS

0:39 Yeah, I was director of service.

SARAH

0:41 Okay, cool. And what's your?

KRIS

0:43 Hello?

SARAH

0:46 What was that?

KRIS

0:47 Kris, is our service manager?

KRIS

0:49 Okay, perfect.

KRIS

0:52 And Erica, he'll be joining us is basically our service admin.

SARAH

0:57 Okay. We'll give her a few minutes to hop on here.

SARAH

1:10 Yeah, glad it's Friday.

KRIS

1:12 Yes, about you?

SARAH

1:15 Very glad. Yeah, it's week went by really slow for some reason.

KRIS

1:56 We can probably going to get started. And honestly, if she is.

KRIS

2:11 You're... fine. You're totally right on it. Would you be... you call them via?

KRIS

2:31 Hi, Erica.

KRIS

2:34 Sorry, let's say.

SARAH

2:36 Hey, thanks for joining. My name's. Sarah. I'm one of the territory managers here at service trade. And really, my goal for our meeting today is to determine if service trade would be a good fit for your business. But first, I just like to learn, you know, a little bit more about you guys are day to day workflow.

--- Call Setup ends ---

SARAH

2:52 And then we can walkthrough the platform. And if you all like what you see today, we can determine next steps at the end of our meeting. If that sounds like a good plan, the guidance.

KRIS

3:01 Okay. So, right now, we use echo, when I'm not sure if you're familiar with the software, but it's a little outdated. There's a lot of things that are more automated with more current platforms that we're just not getting out of that. So we've been using it for about eight years and I don't think they've updated the software and the entire time. So, so, yeah, you know what's important for us as much automation as possible. You know, right now, if a service call comes in, we actually have to enter it into echo in, flag it for pick up from a certain tag, call the tech and say, hey, I just put a call on your iPad, go ahead and sync it to tag things as iPad. It goes to him. So it's really that's just not very efficient.

SARAH

3:51 Right. Kind have a cumbersome process. Yeah. I've heard of, I've talked with a few companies on the Act-On and I know it's an older platform and kind of have a little clunky. I'm not very streamlined. What else specifically are you guys looking for in a new software platform and that, you know, might not be that efficient within act when?

KRIS

4:13 I think the ability to set specific markups for certain customers, inventory management would be great... something compatible with what type of collaborative software and office would be nice... from a billing standpoint. Is there?

KRIS

4:39 Just pretty much like the ease of business like at the end of the day is a lot of steps that we have to do from my initiating the invoice to having to give it to someone else just to go back and put it another software. So, I know that with others, things that we kind of looked into like he can actually have the invoice done and it would only have to go to me to input it multiple steps just to the invoice, the customer.

SARAH

5:08 Right. What are you guys on for accounting right now?

KRIS

5:12 50?

SARAH

5:13 Okay. And so are y'all, using act one for like quoting as well? Or are you guys using? Okay... let's see, are y'all, and y'all are fully commercial? Is that correct?

KRIS

5:27 For the most part, if we do residential, it's going to be friends with the owner?

SARAH

5:30 Okay. Gotcha. And then...

KRIS

5:34 Hi, Sarah. Yes, Monday. I think from our standpoint, we... are always looking at it right now from a service software standpoint. Our Construction department uses a different format altogether as, and I don't think for at least from what our research doesn't look like anything actually... interconnects or works well with Sage 50. So, I think we're looking at right now... for strictly from a service software standpoint.

SARAH

6:11 Right. What are you guys using for Construction? Just out of curiosity? Okay, we actually have a partnership with pro for five is curious because Gina had told me that you guys did have a pretty big Construction department. And he said y'all are kind of looking to grow your service department. I was curious if you all had any growth goals are what you kinda wanna build your service department up to?

KRIS

6:36 Right now, we're running three tags. Ideally, we'd like to be anywhere between six and 10 as soon as possible.

SARAH

6:46 Okay. Perfect. Well, that's our whole goal. And yeah, we were built specifically for the service side. So you can do, you know, smaller projects within service trade typically 90 days or less, but anything over that 90 day mark gets kinda clunky. So, you know, we were built specifically for your service side, and we do have that partnership with pro core. If y'all, ever, did, you know, want to integrate the two... let's see if you guys are finding a deficiency out in the field. How are they reporting that back to the office or are they doing that through echo in, are they like calling the office?

KRIS

7:20 It's kind of a jungle. The, they'll text me or call. Sometimes they'll just mentioned and their resolution notes at the end of a service call. And then we have to be lucky enough to see that within a certain amount of time to address.

SARAH

7:34 Right. Okay. And are you guys doing a lot of preventative maintenance or is it mainly, okay. And are you tracking that through apple in or excel?

KRIS

7:45 So, we have an excel spreadsheet with kind have a schedule quarterly and we go off of that spreadsheet to create all the different preventative maintenance calls for any given quarter as it comes.

SARAH

7:58 Okay. Oftentimes, when I talked to companies that are on excel, sometimes, you know, they'll forget to re, enter in that information so they might end up missing jobs. Are you guys ever having that happen?

KRIS

8:11 It's it's happened before, not too often, but.

SARAH

8:14 Yeah. Okay. If you guys did find something that was a better fit for y'all, when would you be looking to get up and running with a new system?

KRIS

8:24 At the latest, we're open January one.

SARAH

8:27 Okay. And is the decision solely up to you guys or who else would you pull? And?

KRIS

8:32 Pretty much are so close.

SARAH

8:34 Okay, perfect. And then have y'all, discussed a budget at all for new software system?

KRIS

8:42 We've gotten pricing from different platforms out there. So we don't really have a set budget in place.

SARAH

8:53 Will cover pricing at the end today, if y'all, like what you see, who else have you guys looked at? Just out of curiosity?

KRIS

9:00 We've we've looked at BuildOps the, you know, we're in the process, possibly checking out service tight and some others.

SARAH

9:11 Gotcha. Okay. Cool. Well, unless you guys have any questions for me, we can go ahead and get started. Sure. Okay, I'm going to share just a little bit of background information about service trade and then we'll hop over to the platform?

SARAH

9:33 If my screen will load... okay, can you guys see my screen? Okay. Yup. Alright. So service trade. We were founded in 2012. And ever since then we've been focused exclusively on the commercial services industry. We have over 800 customers in the US and Canada. And we're proud to say that we have a 95 percent customer retention rate. And here on this slide, you can see some of the better name and the companies that trust us. And our mission is always been to help companies like yours would be more valuable to your customers so that you can grow your business in a scaleable way. And the past few years in particular has been years for mechanical contractors. And study that we conducted recently found that since sort of 2020, the mechanical industry has grown by about 50 percent. So this means that fast or if it's a standard if you want to keep up and helping you guys do that's, what I'm gonna talk with you about today. And based on our long history of working with companies in the mechanical industry, we've identified a few key things. So the top performing companies are doing to drive this growth in the first is operational efficiency. So we're very aware that there's a skilled labor shortage in the market and making it hard to find technicians. So it's super critical that you guys are getting the most out of the resources you already have on hand. And one way we help with that, it's not making your scheduling and sufficient as possible so that your texts are spending less time driving in more time doing billable work. And the second attracting and retaining the best customers. So we want your company to be able to present itself and the best way possible to your customer. Said that, you know, you guys are sharing and all the hard work our doing the best serve them and keep their business as well as attract new customers. And when we looked at top performing companies, one of the most significant things that they're doing to drive this growth is how they're reporting repair opportunities are finding in the field. And then getting this converted into quotes. So service trade plays a major role in that by making it super easy for your text to document deficiencies found in the field. Easy for your office to close this out. And an extremely easy for your customers to approve. You don't have any questions on any of those major things within service trade?

KRIS

11:45 Nope. Nope.

SARAH

11:46 Okay. Can you see where it says service trade demo right here? Up top. Yeah. Alright, perfect. Well, you guys feel free to interrupt me to, at any time if you don't have questions, but there's three core piece of service trade. You'll have the office view your technician view, and then your customer view. And this is what we call the service dashboard, the homepage of service trade. And this is really what your office well first see when they log into service trade in the morning. And it's really just a high level overview of what you guys have going on for that day upcoming. So you'll have your daily schedule here with your jobs for that day along with the time there at the technician assigned to them in their location. You'll have ever do jobs without appointments. So for some reason you guys did forget to schedule out a PM. It would populate here to this bucket letting you know, you need to get and get that scheduled out. So that you guys aren't missing anything. You'll have jobs with that appointment is doing the next two weeks. So these would be all of your upcoming pins populating here to this bucket and helping you keep this top of mind, knowing you need to go ahead and get this scheduled out so that nothing's slipping through the cracks. You'll have past jobs to be marked complete. So once your technician is completing a job in the field, it will populate here to this bucket, letting your office and edit this job has been completed. They then can review, you know, all that information, make any adjustments if needed before going ahead and sending that invoice out to the customer. And then down here, you have completed jobs to be invoice. So these are jobs you guys are just completely done with and need to get that invoice sent out. And then over here on your right hand side, you have your current tech locations. So service trade takes a GPS snapshot of where your texts are every time they're clocking in and out of service trade. So this just gives you know, y'all visibility into where your tags they're at throughout the day. And then you'll have recent clock event. It's just giving you all visibility into how much time your text are spending a different job sites throughout the day. Did y'all have any questions regarding the service dashboard?

KRIS

13:45 No, it's pretty straightforward.

SARAH

13:47 Yeah, super self explanatory, but we can hop over here to a service opportunities. So this is how you guys and kind of track your preventative maintenance schedule within service trade. These are all of your upcoming services. And here you can filter this however you want, you know, your services do this month, the next month. Today, next week, I ran a report for all of our upcoming services we have for the next three months and you can click on leads, see when the services do by the type of job that it is along with. You know, if you have a preferred technician you want to complete this job, and from here, you can create these jobs one at a time or even bulk, create these all at once. But we'll just create a fee for our example today. And once you create those jobs, they populate over here to our, yeah based scheduler is pins. So we can click on these pins, see what type of job it is as well as the location. And from here, it's a simple drag and drop process to get these assigned to a technician and scheduled. So we can assign this. Let's say we won't broker to complete this job. Your text will be court color coordinated over here on the left hand side. So you can clearly see that the great pin represents of this job has unscheduled. And since we just drive that pin to Brooke, now this job has been assigned to book. And then we still need to get it scheduled out. So we can drag it down here. And we'll say today and a little calendar will not pop up on the pin letting you know this job has been scheduled and it's clearly been assigned to broke since it's blue. Do you guys see that being a pretty simple process for running that report of your upcoming recurring services and getting them scheduled out?

KRIS

15:37 Yeah.

SARAH

15:40 How are you all scheduling now?

KRIS

15:44 It's pretty much just service call comes in. We create it and see what makes the most sense. From a logistics standpoint.

--- Small Talk ---

KRIS

15:52 We pretty much work within the 465 area. We have a few which is central Indiana, right around Indianapolis. We have a few stragglers down about, but we're pretty familiar with the area. So it's easy to kind of re route that out.

SARAH

16:05 Gotcha.

KRIS

16:06 Thing that we can do to develop our brain power toward more predictive stuff for us here in the office would be, it'll be better. So we'll see it on a map like that laid out and everything is nice.

--- Small Talk ends ---

SARAH

16:20 Definitely. And then we also have a dispatch board I'll show you guys that y'all can use for your emergency service calls that come in. So this anytime y'all get a call, you can just go here, input your text. So obviously be ever dropped hand side. You would just click add job over here on the left. And here you can put in the location. I'll say outback called... let's see my wife that slow. And you can select the correct customer that's already in service trade. So it auto fills, you know, your contact or on site the location the service call, you can write a description of the problem and then you just create that and it would populate here to whichever swim Lane technician you sign that too. And then you can even drag and drop these and move them around as needed if you want to assign it to a different tack. So that's just a pretty simple way to get those calls and quickly and get them out to your technician, right? When you assign it to a technician will pop up in their app for them to see that a service call has been assigned to them. But we can hop over here. I created a mock job, have a quarterly PM for us to walkthrough today. And this is a work order within service trade. We call it a job. And this is obviously still from the office view. And here on this page, you're going to have all the important information that you would typically have on your work orders. So you have your customer here along with the location that you're working at, we can scroll down and see tell of the service that needs to be performed along with the specific piece of equipment we're going to be working on. We can see when the services Dubai, along with the technician that's been assigned to this job... here, we would have our parts, labor and items and our clock events. So we can see that I've clocked in route and I'm 58. And now it's almost a 1,000 Miles away from this job site. So again, it's taking that GPS snapshot, making sure your texts or where they're supposed to be in, not at mcdonald's eating lunch. But the real power of service trade is for your text to be able to communicate in real time with the office throughout the workday so we can go ahead and hop out to the field. And I'll show you guys how all the information I'm expecting in the field, how it'll be translating in real time back for visibility in the office.

SARAH

19:01 Okay. You'll see where it says walgreens. Alright. Okay. So down here at the bottom, we can say I've been in route driving for about 21 minutes. If we want to notify our customer, when we're going to be arriving, we can just by clicking notify customer. So, Aaron, I'll send this to you and you'll receive an email notification letting you know what time to be that I'll be arriving along with a picture of me so that you know, who to be expecting. And then once I arrive on site, I think ahead and clock out of in route and it'll automatically ask me if I want to clock in on site. So I'll click. Okay. And now our own site time, we'll be tracking down at the bottom and hear your technicians are going to have access, you know, to all the important information they're going to need to complete their job accurately and effectively. So we can click our services tile here and see details of the service that we need to perform. We can click on our assets, tile see the specific piece of equipment that we're going to be working on, and we can even click into that piece of equipment and see all of our previous service history for this piece of equipment along with any deficiencies, admin log on this piece of equipment as well. How are your guys accessing service history? Now? Do they have that?

KRIS

20:21 Do we have there's just a history? And it'll pull up all of that. It's not really equipment specific site specific.

SARAH

20:28 Okay. Gotcha. Do you think it'll be helpful for them to have this where it's on that specific piece of equipment?

KRIS

20:35 Absolutely.

SARAH

20:36 Yeah. Are they kinda just having to dig through that I guess upon a piece of equipment there? And then we'll have job items here. So your parts labor an items.

And if your tech, you know, needed to document another part that they use to complete their job, they can just do that by clicking add part down there at the bottom. And then for if we go back here, I'm going to show you this when we first started. But any jobs that, you know, emergency service calls as they come in and you assign them to a tech, they would populate here just for them to see. So this is filtered by the day so they can see the jobs that have been assigned to them for the day. But if we click that off and see too that I have some old jobs I haven't gotten to yet... but we'll get back to our job for the day. And like you guys heard me talking about earlier, you know, one of the main drivers of brands. It's really capitalizing on this repair opportunities. You're finding out in the field and getting them converted into quotes. So if we click here on our deficiencies tile, we can see any previous deficiencies that have been logged at this location as well as easily document new repair opportunity for finding out in the field just by clicking add deficiency. And we'll say we found a burden compressor... and your text don't have to be to script because then they'll be able to take a picture, video audio and then of what they found out in the field. So we'll take a picture of my pin here that will be our broken compressor for the day and we'll hit next. And then it'll ask us to mark the severity of the deficiencies. So we'll say it's an operable, the system's not functioning. And then we'll tied to the piece of equipment that we're working on again, building that services through to, through the work you guys are already doing. And then we'll Mark the status of the deficiencies new and say that, are you guys taking pictures out in the field now?

KRIS

22:39 Yes, but it's not really tied into the software. It's going to be a text message to me here or say, hey, this is broken. And here's the unit information. We need condenser, fan, motor, compressor and what whatever it may be.

SARAH

22:53 Okay. So we'll hop back to the office now and you guys in the office would actually receive an email notification letting you know that inefficiency had been reported. And we can scroll down here on our job page and now see that a deficiency has been logged out in the field. So we can click on this defense deficiency and it'll bring us here to our deficiency report. And in the email that the office received, that would also have a link that they could click on, that would bring them right here to this page. And this deficiency report just shows you guys, you know, what was found location by who, the severity of the deficiency along with any of those pictures, videos or audience. And is that your technician took while they were out in the field. And then we also have the efficiency history and related deficiencies. So this is helpful for you guys, you know, if it's something that's constantly breaking over and over again, you might want to recommend your customer. It's time to replace it instead of repair it. But do you guys see that being a pretty simple way to get those repair opportunities report? If you never, they're not having to text or call, you wouldn't have all that information in one place.

KRIS

24:05 Yes, sir.

SARAH

24:07 Yeah. And then from here, we can go ahead and easily get this quoted out just by clicking create a quote... and it'll bring us here to our output page. And one thing that our customers really love about service trade is the ability to apply for templates. So, if we click apply put template here, these will be templates for any common repairs that you guys are doing often. So we'll use our compressor replacement template for today. This would obviously be all of your verbiage. This is just our example within our demo account, but we'll go ahead and add this to the quote. And then we can just scroll down, you know, review everything, make sure it all looks good. And then once it does, we can go ahead and send that to our customer just by clicking, send the customer in here. You'd be able to toggle on and off, you know, any media that you want to include in the quote or maybe that you don't some of our customers say that their texts like using that audience in the feature when they found a deficiency being like, hey, Erica, go ahead and ordered this part and go ahead and get this put out to the customer instead of having to type stuff out if they have a message. So you definitely want to toggle that off for your customer, not to hear, but we want to include our picture of our broken compressors and we can visibly show our customer that this is broken, that needs to be fixed, Aaron, do you have access to your email right now?

KRIS

25:33 No, unfortunately not.

SARAH

25:35 Okay. Do you, Kris, yup.

KRIS

25:39 Okay.

SARAH

25:39 Let me put you in here real quickly then, and I'll go ahead and send this quote to you just so that you can kind of see how it would be... from your customer standpoint.

SARAH

26:05 Okay. I'm gonna send this to you. And then if you'll approve it for me once you get it here in a second?

KRIS

26:09 Okay.

KRIS

26:17 Just came through.

SARAH

26:23 Pull it up here.

KRIS

26:24 So, this is what the customer would see here.

SARAH

26:27 Yeah. So this would be your customer facing quote. It would be custom branded. Obviously with your logo here up top, have a description of the work that needs to be done, your parts labor an items. And then down here would be any of those pictures that you wanted to include on your quote. We recommend that you include about four, two, five pieces of multimedia. We've found that's produce the highest when rates on points for our customers. And then up here, you have the big green approved button along with a request changes button. So if your customer did have another question about this quote, instead of having to call you guys back in the office, they can just enter that in here. And then your office would receive an email notification letting you know that a customer had requested changes.

KRIS

27:11 Okay, very cool. Yeah, yeah.

SARAH

27:14 What are your thoughts on the customer facing, but.

KRIS

27:19 That's very handy.

KRIS

27:20 Yeah, sure.

SARAH

27:23 So, regardless quoting through echoing now and then sending this out through email.

KRIS

27:28 Right.

SARAH

27:30 Okay. So just, yeah, makes it easy to, for your customer to approve it with a click of a button. Let me refresh my page here. Where are you able to approve that, Kris? Yup.

KRIS

27:43 Yes.

SARAH

27:45 Perfect. So now we can see that our quote.

KRIS

27:52 Alright.

SARAH

27:55 Now, I can see that are quite status has been changed from submitted to approved. And another feature that our customers really like about service trade is this history button here. So this shows you guys the full life cycle of the quote so that we can see the exact time I've sent this to Kris when he viewed the quote along with when he approved it. So this just gives you guys, you know, good visibility into what's going on with the quote. If it's been a week and they haven't even viewed it, you might wanna resend it to get it at the top of their inbox or if someone's looking at it a lot, but they haven't responded, it will show you the right person you might want to follow up with. Are you guys keeping track of your quotes now?

KRIS

28:37 Not necessarily keeping track of them inside of the software, but we do have like a paper file history trail of them though.

SARAH

28:46 Okay. So we make it really easy for you guys to track your quotes as well. So if we go here to our quotes tab?

SARAH

28:57 Here, y'all can run a report of the put status however you would like to. So here, this report is ran by all the quotes that we've submitted but have not been viewed and you can even put, you know, the expiration date. So if these are all about to expire, saying you might wanna resend, needs to get them at the top of your customers inbox since, you know, that they haven't even looked at this quite yet, and you can resend these one at a time or even bulk resend these all at once. But you can filter this, you know, however you want. We have submitted and viewed, but they haven't responded to it approved quotes. So this is just, you know, a really simple way to run that report and see where you're at with Sarah and kind of what's going on with them. Do you think that would be kind of helpful to have instead of the paper file cabinet?

KRIS

29:47 Yeah, yeah.

SARAH

29:49 Yeah. So makes it is really easy for you guys to keep track of that, not have to go digging through a file. But then from here, now that are quick has been approved, we can either create a new job from this flow or add it to an existing job. You know, if y'all might be on this job site within the next couple of days, but we'll go ahead and hop back out to the field to finish our preventative maintenance for the day... or y'all collecting signatures in the.

KRIS

30:22 Not really.

SARAH

30:23 Okay. Is that something you'd want to start doing or? Yeah, yeah. Well, we make it easy for you guys to do that. If that is something that you want to start doing more. So we'll go back here. Once we finish our job for the day, we can scroll down and go to create a work acknowledgement. And here we can select our contact on site, hit review of top. And then your technician can turn their phone or tablet, whatever they're using out in the field around to that contact on site and say, hey, you know, I did our quarterly PM for the day. I did find a broken compressors. So go ahead and let her person who to be expecting a quote for that from us. And then these would be all of your terms and conditions and they can toggle off that they knowledge than and sign... and what's your technician, that's completed their job in the field, they've gotten that signature. If you want them to collect that, they can go in and clock out. It will then ask them to mark off other completed services. So we'll double check, make sure we did everything we were supposed to do for the day... and hit next tier up top. And then if they're done with this visit will say yes and finished clocking out. And now we'll hop back to the office.

SARAH

31:53 And we now can see that our job has been completed out in the field. So now to this job and populate into that bucket on the service dashboard I showed you showed me where it said that their job has been finished. So the office can review all this information. If they would have documented another part in the field, it would show up here. We can see their four o'clock events... and route for 22 minutes on site for 12. And you also can see this GPS snapshots of where I was and I was talk in and out of this job. We can see any deficiencies that were reported at while our tech was in the field. And then down here under attachments would be a copy of that working knowledge meant that your customer signed off on and any other pictures your technician might have taken, you know, maybe before and after pictures. And then, you know, the office can make any adjustments to this as needed. But once everything looks good, they can go ahead and complete the job from the office and go ahead and create the invoice.

SARAH

33:02 And then it'll bring us here to our invoice page... and we can see that our gross margin is in the negatives. So we definitely want to go in and hit this pencil and make an adjustment to our pricing.

SARAH

33:20 We can save that. And like you were talking about your market roles earlier, Kris, that is when you all that on board with service trade, all your prices as well as markup roles for specific customers would be applied. So hopefully, you guys wouldn't have to go in and change, you know, any of this because it would already be within service trade. But once you know, everything looks good here, we can go ahead and send the invoice out to our customer just by clicking send invoice link. And this would be what you're saying invoice would look like. So again, it would be custom ended with your logo here. Up top. We can scroll down, see our parts labor in items as well as the grand total service trade is super permission based. So it's totally up to you all, you know, what you want to include on your quotes and invoices, if you just wanted to send the grand total and not show your parts labor an item. So you can do that as well. Totally up to you guys, what you want to include on it. And then up here, we have the big green pay now button and making it super easy for your customer to go ahead and pay you guys with credit card or a CH. What are you all thinking about the customer facing invoice?

KRIS

34:31 Yeah, I'm pretty self explanatory. I don't know how they pay now button will work for us, but... we'll have to figure that out. But I don't know how that would go in conjunction to be able to get to our... Construction site just to be honest because that's where the pain is we need to go. We don't have a way to receive payments on this that unless we just get their information.

SARAH

35:03 How are you guys charging your customers now?

KRIS

35:08 What do you mean? What, how we charging them?

SARAH

35:10 Like how invoicing now? Are you mean into Sage?

KRIS

35:14 Yes. So the situation with us is like, so I deleted voice on the service side, but we put it in Sage, which is our Construction Maine... my interface that another person in the office uses. So we have to created an echo in, but then we have to input it in stage. So all the payments as received go on that end of the office if that makes sense.

SARAH

35:41 Yes. So you guys would still be able to invoice within service trade. You would just have, that would be the only double data entry go and have to do. So, you would just have to re, enter that information into Sage?

KRIS

35:58 Right, right.

SARAH

35:59 So, it wouldn't be the exact same. You could just invoice through service trade, but then you would have to re, input that information to Sage, but it'll just make it more simple buckets, the end service trade, you know, all your prices are already going to be their markup rules. So all that information will be accurate. You'll just have to, yeah, put it into Sage.

KRIS

36:20 So, just asking as a way to disable that pay now button on the invoice.

SARAH

36:28 I'm not sure about that. I would have to ask like you would want to send the invoice without?

KRIS

36:34 Hey, now... in the, you know, creating something so that they get pay now and it goes to the right department because we don't receive money on this thing.

KRIS

36:45 Yeah. I'll say somebody wanted to pay by our charge burn. I mean, we can certainly take the charger information.

KRIS

36:52 Where's the money then?

KRIS

36:53 No, we'll just have to do what we do now, which is setup process the payment in the southern down to say, wow.

KRIS

37:00 I don't think this thing like it's just, it's not just capturing the information to that. So you'd sign is tying, it will actually need something for where the money is funny though.

KRIS

37:10 So when people pay now with credit card, how was the problem?

KRIS

37:13 Have a whole another merchant website. I have to go to.

KRIS

37:17 No, I have to do the same thing, right?

KRIS

37:20 We would have to, if we like, if we dig deeper, maybe there's a way to have this connected to the, our Chase merchant website, but other than... that pay now wouldn't go anywhere for us now.

KRIS

37:36 Preference, my preference would be everyone pay now.

KRIS

37:40 Yeah, I like the option. They'll get me wrong. I'm just saying.

KRIS

37:43 Hello, you offer a cash or pay whatever you wanna call it a cash discount of five percent on the Bill or whatever. I just have all my money.

KRIS

37:51 Yeah, no, I.

KRIS

37:51 Love the worst. Hang up the whole merger Chase.

KRIS

37:55 Yeah, it was just capturing the information. They, yeah, but is actually wanting to process. So that's why?

KRIS

38:03 Is that right? Sarah, it would send them a Bill that it was paid bills bye?

SARAH

38:09 Yes. So, so you're saying y'all, don't capture money for the service department at all, like has to go through the construct.

KRIS

38:20 Correct. Yeah.

SARAH

38:21 Okay.

KRIS

38:23 Not really a separate entity. We're still under the big umbrella of the Construction to TPC.

SARAH

38:34 I'll have to ask about that.

KRIS

38:38 I'm sure there's a way, but I was just asking if there was a way to disable that. We'd probably have to go that route if not tried to click, allow this to kind of, I guess talk to the Chase merchant website where we'd say credit card thing... because we don't have that on. Like I, if someone gives me their information that I have to go into another system to input, it is not just automated, no type of way.

KRIS

39:09 Hi there, Sarah. Thanks.

KRIS

39:12 Yeah, yeah.

KRIS

39:19 Sarah.

KRIS

39:26 We, are those now... two months ago, girl? Yeah.

KRIS

39:39 Yeah, I would love to be to have that pay now though. That will be.

KRIS

39:43 Nice.

KRIS

39:44 Yeah, for sure. I just got nowhere.

KRIS

39:48 Go off your goal.

KRIS

39:50 Yep. And do AC, H, they could do that. Would be nice. I'm checking automatic clearing. I mean, what is it automatic thing now?

KRIS

40:07 All the recruiting goals, church pressing else, but Drew Sanders and go do much time. I was calling me photo because it's somebody that owns hearing development, sky's falling one sense to show. Okay, well, we're not gonna just walk away because it's right? I miss canvas here. We have an hour blocked out certainly, etcetera. They didn't send me an.

SARAH

40:39 Hey, guys, my wife, I went now.

KRIS

40:42 You must, they exceeded your out of the word. Y'all... decided to drop it.

SARAH

40:51 Hello. I am, I'm from North Carolina. Yeah, I know anytime I'm talking to people that are like on the west coast, they make fun of me and say, ask for of...

KRIS

41:02 The west coast?

SARAH

41:07 Those funny. I was asking, how are you guys collecting payments now? Like are they still paying either like a credit card?

KRIS

41:17 We say check and credit would say check payments and credit card payments, checks, of course, kind of through the mail. I know we do have some automatic check payments. They come in, they send us the remade Indian. They have our information forward to just go into our account, but again, is on the other side of the office. The, this is process. So when the checks come in that she process is done in the past is them, and then I just kinda get this the and marketing on our end, that is banned pay.

SARAH

41:50 Okay. That makes sense. I'm gonna double check on how that would work or if there's a way, yeah, that you could send this without the pay now button and I'll get back to you guys on that. But another...

KRIS

42:06 It's not that we don't want them to pay now, right? So start right now, we don't we're not sure how we would, what changes we would need to make to get that process without creating a headache for either our existing accounting in house accounting person.

KRIS

42:25 Well, that wouldn't be necessarily issue. We just want to figure out how to do it so that money wouldn't go into oblivion, I guess. So it wouldn't be an issue because we are ready to do that. We just do it in another platform. We just go through another site. So we just have to kind of figure out how to integrate that with that site because it wouldn't be, it wouldn't be an additional headache for the images. The, can we make that change?

SARAH

42:53 Right. Okay. Yeah, that makes sense. I'm gonna ask about that because I need to, that we have integrations with Sage, but yeah.

KRIS

43:04 Is a Sage. Wow.

SARAH

43:05 Sage 50. It's kind have, yeah, we have a Sage 100 connector, but I don't believe we can integrate with Sage 50, but I'll double check on that as well. But another thing that our customers do like about our invoice is, and I just wanted to show you guys if we click here, go to service details.

SARAH

43:30 Takes them to what we call the service link and a Rich, what you guys did for your customer. So they can see we did our quarterly PM if you want to include your parts labor an items, you can do that as well. Again, this is permission based and shows what you want it to. And then here under files would be a copy that working knowledge meant that they signed off on and any other media that you wanted to include. So maybe before and after pictures and then here under alerts would be any deficiencies that your technician found while they were out on site as well. So.

KRIS

44:04 Sorry, you kind of broke up. What are we, what are we looking at, right?

SARAH

44:07 This is the service link. So this is on the invoice. They can just click and it shows the service details. So it shows what you guys did for them here. Under files would be that working knowledge meant that they signed off on along with any pictures. Like if you wanted to include before and after pictures in here under alerts, would be any deficiencies that y'all found while you were on site. So this just, you know, our customers have said that this is eliminated than being called back, asking what they're being charged for because it clearly shows, you know, what you guys did for them while you were there and just kinda help some focus more on the value of your work rather than the price... but.

KRIS

44:49 Essentially.

SARAH

44:52 The seat for super high level overview of service, your thoughts. And if you think it would be a good fit for you guys.

KRIS

45:02 I like it.

KRIS

45:04 Yeah, I think it's it would be very beneficial.

KRIS

45:09 Yeah, very user friendly for sure.

SARAH

45:12 Definitely. Let's see. Do you all want to cover pricing real quick? Sure. Okay.

KRIS

45:23 How many years you get for free?

SARAH

45:26 Unfortunately.

KRIS

45:28 Alter ego, your ServiceFusion, whole hog barbecue.

KRIS

45:36 CH back. She froze.

SARAH

45:39 Gosh. It, my wife. I, okay. Well, what does that cover pricing before I break up?

KRIS

45:46 Why don't we don't pay or, but we pay our bills about as well repair internet.

SARAH

45:56 I do like barbecue, yeah.

KRIS

45:58 Are you more of electric barbecue or are you like the vinegar based barbecue?

SARAH

46:06 I'm not picky. I like it all. What kind do you like?

KRIS

46:10 Well, I'm from the midwest. So I, whatever smoke, I don't care. I'm lucky or whatever.

SARAH

46:15 Yeah. Okay. So.

KRIS

46:19 I got, I'm getting all kinds of work for my staff over here, like done as rabbit hole food.

SARAH

46:27 Okay. You're making me hungry for lunch. So for service trade, we Bill annually and all your office staff, it's free and unlimited. So we charge you by service technicians, the guys that are in the field making you money.

--- Pricing ---

SARAH

46:41 And I would recommend y'all, start on our base select plan which includes everything that you also on a day. And for our select plan, it covers you from zero to five technicians. So I know you guys only have three right now, but that would already include those extra two licenses as you grow. And for your first year total, it would be right under 6,517 50 of that would be a one time onboarding fee. So your annual subscription would be 47 40 and that breaks down to 79 dollars per month per tech.

KRIS

47:28 Character limit. And then what was that? Protect number? Again? Sorry?

SARAH

47:34 79 dollars per month per tack. And then like I said, that covers y'all until you surpass that five technician mark. So, if you did add a six tech, we would just prorate that 79 dollars per month until you're next subscription would come around.

KRIS

47:52 Okay.

SARAH

47:55 And then for...

KRIS

47:57 Device. So, in other words, if you said we're in send here, we're free so to speak. But if the check out an iPad and was also on the phone and connected. So, in other words, he was using his phone, taking pictures and sending it through his I pad, which would send it to us. Is it per device or per... pair? Okay?

SARAH

48:26 Users. So he'll just have its own log in and he can log into that service, try and build out on any device.

KRIS

48:33 Can you be logged in on his I pad and his phone at the same time?

SARAH

48:37 I believe so. I'd have to double check on that. I think he could, I don't think it would log them out of one, but I'll check on that as well. I'll send you guys a recap email and I can include the demo of this or the recording of this demo if you wanted to look back at it for some reason. And I'll include a formal quote with that pricing broken down, if that would be helpful. And I can include some information regarding our onboarding process. So just to be transparent, the next available start date that we have it's August fifteenth and then the next day after that would be September first. And for a company your size, it would take about 60 days to get on boarded. And during that period, you're provided a project manager that works specifically with your company to help you upload all your information into service trade and, you know, your customers location in services, all that important stuff.

--- Pricing ends ---

SARAH

49:32 And then y'all are provided training as well. During that time, we're super big on onboarding and setting you guys up for success. And we're not gonna throw you the keys and let you drive. So it would be about 60 days after your start date that you wouldn't be up and running live with service trade. But I can send you guys a recap email. And in terms, I'll also check on accounting. We have... someone that works with us that used to work at Sage and she's kind of our integrations expert. So I can ask her about how that invoicing would work for you guys and include that in the recap email as well. And we might even want to schedule a follow up meeting with her where she could kinda go over.

KRIS

50:22 Sure how?

SARAH

50:23 That would work.

KRIS

50:24 I was gonna say that have to wait on the integration into Sage for that pay now button that we don't use Sage actually to make payments. We use it arch our banking website.

SARAH

50:38 Okay.

KRIS

50:39 So, you don't have to worry about that. We just need to pay now to integrate with our Chase thinking.

KRIS

50:47 But from a standpoint of preventing double entry, Sarah, it would be nice to know if there was a day?

SARAH

50:53 Yeah, I'll ask about that.

KRIS

50:58 She didn't hear you. She was.

KRIS

51:01 The, as far as the integration with Sage 50 from service trade, it would, if there was a way that they integrated to where we can prevent having to double entry or double enter the same thing, that would be of interest. We have a lady who's kind of like relevant there. So the chances of us getting her to upgrade to stage 100 would be short and they're short of her death, near death experience would probably be to do.

SARAH

51:31 Yeah, I'll ask about that. I wanna say for Sage 50 that there's not an integration. You aren't gonna have to just remain only enter that information, but I know you have, yeah, Sage, 100 integration. If you guys ever did wanna upgrade to that for your accounting system. But again, that integration would be an extra fee. And since y'all are of a small service department right now, I'm just starting out, I would still even if you have 100 recommend that you start out doing it how you're doing it now. And then, you know, that could always be an option down the road. But in terms of next steps, I guess you guys need to... discuss... this internally, when would be a good time for us to reconnect just to kind of determine interest and next steps and answer any other questions that might have might come up?

--- *Wrap-up* ---

KRIS

52:32 Would next Friday word? Okay?

SARAH

52:35 Yeah, I could do Friday. What would be a good time for you guys?

KRIS

52:42 Could stick with the 10 o'clock slot if you're available at Penn?

SARAH

52:46 Yeah, I can do 10 o'clock... okay. So I'll send you all another Google calendar invite just for 10 o'clock...

KRIS

52:55 So, now, if you would.

SARAH

52:58 Okay. Just to Kris.

KRIS

53:01 You could send it to everybody, but he's the one we're in his office and she's huh, he's got fallaciously.

SARAH

53:07 Okay, perfect. Well, I'll send it to you, Kris, and then it'll have a Zoom link and we can meet just like we did today just to answer any other questions. And, you know, determine your interests and next steps and if anything does come up before we reconnect on Friday, feel free to call me or email me back, but I'll get that recap email, send everybody all by the end of the day.

KRIS

53:28 Awesome. Sounds good. And I don't think we'll need the recorded... this, but all the other info. So it sounded good.

SARAH

53:36 Okay, perfect. Well, I appreciate you guys time. I hope y'all, have a good weekend and I look forward to talking again next week. Thank you.

KRIS

53:44 Thanks, Sarah.

SARAH

53:45 Thank you. Bye.

KRIS

53:47 Bye, bye bye.

The End