



# ServiceTrade Demo with FRANK M BOOTH INC

Meda Piner with FRANK M BOOTH INC  
Recorded on 7/25/23 via Zoom, 1 hour 8 min.

## Participants

### **SERVICE**TRADE

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### **OTHER**

19168783808

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# Topics

<i>Access to information</i> .....	1:11
<i>Purchase decision</i> .....	2:23
<i>Pricing</i> .....	3:14
<i>Accounting integrations</i> .....	3:30
<i>Accounting integrations</i> .....	4:43
<i>Type of work</i> .....	6:26
<i>Pricing</i> .....	7:11
<i>Type of work</i> .....	7:25
<i>Recurring maintenance</i> .....	7:48
<i>Type of work</i> .....	8:04
<i>Purchase decision</i> .....	9:19
<i>Accounting integrations</i> .....	10:13
<i>Invoicing</i> .....	11:13
<i>Parts management (purchase orders)</i> .....	12:04
<i>Parts management (inventory)</i> .....	12:26
<i>Parts management (purchase orders)</i> .....	13:05
<i>Customer engagement</i> .....	15:37
<i>ST app contracts and pricing</i> .....	16:08
<i>Type of work</i> .....	16:24
<i>Parts management (inventory)</i> .....	16:43
<i>Assets</i> .....	17:03
<i>Customer engagement</i> .....	17:23
<i>Access to information</i> .....	19:11
<i>Tech On-site</i> .....	20:27
<i>Access to information</i> .....	21:03
<i>Recurring maintenance</i> .....	21:23
<i>Parts management (purchase orders)</i> .....	21:41
<i>Quote templates</i> .....	21:55
<i>Parts management (inventory)</i> .....	22:09
<i>Parts management (purchase orders)</i> .....	22:24
<i>Invoicing</i> .....	24:12
<i>Forms</i> .....	24:41
<i>Tech On-site</i> .....	25:03
<i>Access to information</i> .....	25:25
<i>Tech On-site</i> .....	26:51
<i>Tech On-site</i> .....	27:25
<i>Customer engagement (quoting and invoicing)</i> .....	28:04
<i>Tech On-site</i> .....	28:18
<i>Tech On-site</i> .....	28:54

<i>Assets</i> .....	29:28
<i>Quote templates</i> .....	29:44
<i>Parts management (inventory)</i> .....	30:37
<i>Assets</i> .....	31:01
<i>Deficiencies</i> .....	31:19
<i>Accounting integrations</i> .....	31:47
<i>Tech On-site</i> .....	32:31
<i>Customer engagement</i> .....	34:35
<i>Forms</i> .....	35:04
<i>Deficiencies</i> .....	36:00
<i>Quote templates</i> .....	38:46
<i>ST app contracts and pricing</i> .....	39:28
<i>Recurring maintenance</i> .....	39:48
<i>Quote templates</i> .....	40:29
<i>Customer engagement (quoting and invoicing)</i> .....	40:47
<i>Tech On-site</i> .....	41:32
<i>Customer engagement (quoting and invoicing)</i> .....	41:51
<i>Quoting</i> .....	42:22
<i>Deficiencies</i> .....	42:59
<i>Quote templates</i> .....	44:07
<i>Customer engagement (quoting and invoicing)</i> .....	45:23
<i>Quote templates</i> .....	45:43
<i>Customer engagement (quoting and invoicing)</i> .....	46:38
<i>Parts management (purchase orders)</i> .....	48:31
<i>Quoting</i> .....	49:22
<i>Tech On-site</i> .....	49:41
<i>Recurring maintenance</i> .....	50:17
<i>Dispatch</i> .....	50:37
<i>Tech On-site</i> .....	50:53
<i>Assets</i> .....	51:20
<i>Deficiencies</i> .....	52:02
<i>Assets</i> .....	53:00
<i>Deficiencies</i> .....	53:29
<i>Tech On-site</i> .....	53:56
<i>Quote templates</i> .....	55:16
<i>Quote templates</i> .....	56:04
<i>Customer engagement (quoting and invoicing)</i> .....	56:35
<i>Type of work</i> .....	57:09
<i>Dispatch</i> .....	57:31
<i>Tech On-site</i> .....	57:53
<i>Customer engagement (quoting and invoicing)</i> .....	58:35
<i>Purchase decision</i> .....	59:04
<i>Pricing</i> .....	59:30
<i>Accounting</i> .....	59:50

<i>Invoicing</i> .....	1:00:39
<i>Accounting</i> .....	1:01:09
<i>Invoicing</i> .....	1:01:37
<i>Accounting integrations</i> .....	1:02:38
<i>Purchase decision</i> .....	1:03:30
<i>Implementation and ongoing support</i> .....	1:04:03
<i>Pricing</i> .....	1:04:40
<i>Pricing</i> .....	1:05:36

# Transcript

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

MEDA

0:00 Okay. I can shoot you a number to call in so you can chat with us.

MEDA

0:12 It'll be in there under the one tap mobile. You should just be able to hit that number. If not, there's a dial by your location with all those numbers down there as well. Looks like Roberts connecting as well.

MEDA

0:49 Robert, do you know if you have audio on your computer... if not go into the chat box feature and let me know. We can either have you guys call in or I can call you guys and we can kinda do a three way situation. The only issue is the call wouldn't be recorded though.

*--- Access to information ---*

MEDA

1:11 It's up to you guys, if you guys don't you know, care about the recording, we can definitely just do it over the cell phone, and then we can view screens this way or you guys can dial in the Zoom and then we can have that recording.

MEDA

1:31 Like we got some person coming in.

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

19168783808

1:33 Yeah, it's me. It's Teresa.

MEDA

1:36 There we go. Hey, Teresa. How are you doing?

19168783808

1:38 Yeah, sorry. And I'm sorry. How do you pronounce your name?

MEDA

1:42 It's Meda. It's it's a funky one.

19168783808

1:45 Yeah, no, that's it looks like, but I just take.

MEDA

1:51 That's all right. No worries. I was beginning to think I was talking to myself for a second to the chat. I... was like, I don't know who this is.

19168783808

2:02 Yeah.

ROBERT

2:02 Roberts on now. Sorry, little technical difficulties. So I had to join in with the phone for.

MEDA

2:08 No worries. Yeah, no worries at all. Well, my name's Meda. I'm one of the territory managers over here at ServiceTrade. So I'm excited to meet with you guys and learn a little bit more about your business and share a little bit more about ServiceTrade... before we get going, do you guys have a hard stop time?

--- Purchase decision ---

MEDA

2:26 We need to make sure we keep this on.

19168783808

2:29 I...

ROBERT

2:30 About now, we're kinda about that. It's probably good. But as long as everything's going, it'll serve the meeting will serve its purpose. So we're open to however long it takes for the most part. So.

MEDA

2:39 Okay. I won't keep you all night. Don't worry about that. We should be done within an hour. If not, I'm happy to stay later. Happy to set up a second meeting if we don't cover what needs to be covered today. Yeah, excited to share service trade with you guys. I do wanna have kind of a better idea about your business. I got a good bit of notes from Sarah, but just kinda starting off, what are you guys using? How many technicians do you have and tell me a little bit about the business now?

ROBERT

3:11 So right now we currently are using ms.

--- Pricing ---

ROBERT

3:14 I don't know if you're familiar with that. So we use ms I for a technician platform. And right now we're running about five technicians off it. We're looking to get our startup technicians on this platform as well, which would be additional about additional five. So we'd be up to about 10 or so.

--- Accounting integrations ---

ROBERT

3:30 Okay. So yeah, that's kind of where we're at. We've had a lot of challenges shortcomings with ms. As we've grown, we've just kinda outgrown that platform. I mean, we're looking for something where we can quote right away and put a lot of the power back in the technicians hands.

--- Accounting integrations ends ---

MEDA

3:45 Okay. Got you. So I'm taking some notes here. So in terms of giving, you know, the technicians autonomy, do you want there to be a way for the office to have oversight? Whether that's the day to day into the job, maybe the quotes filtering through the office before they're sent to the customer? Or do you want those technicians to have that full autonomy to where they could do the service, go ahead and quote an invoice in the field?

ROBERT

4:16 No. So everything would still go to the office. So yeah, I have in the field, but yeah, we do a last look through and last quality control check. So to speak in the office for sure.

MEDA

4:26 Perfect. Okay. I was about to say, you know, when I hear, you know, giving texts everything that they can do that's the first thing I think of this quality control, we need to make sure that, you know, our invoicing is correct. We're charging for everything that needs to be charged for.

--- Accounting integrations ---

MEDA

4:43 So I always suggest some sort of managerial over site on that part. So we can, absolutely, you know, facilitate that in the software in terms of outgrowing ms, what are you not able to do within that software? And what are you hoping to do with our software?

ROBERT

5:02 So, right now, we're not really able to quote so much from ms. I, currently, we're not even getting work reports. We've had a lot of issues without getting our work reports when the technicians finish something. And just, yeah, there's really no way to quote in the field on the spot quoting. And we're also looking to have like some accounting features where we can look from the office perspective on the accounting and things like that. And ms, I doesn't offer anything, at least what we're set up on doesn't...

MEDA

5:28 Yeah. And most of the times especially with field softwares, they don't have accounting features, right? Because that's what you're accounting softwares for, what accounting features are you looking for that you're not seeing in and you have this Viewpoint, is that for your accounting system?

ROBERT

5:48 Yeah. So what we'd like to see is maybe like a general overview of the business because obviously we have this the right?

--- *Type of work* ---

ROBERT

5:55 We have our Construction group and we're kind of our, you know, we're a smaller entity, right? So obviously Construction, they're well versed and everything that's going on. A lot of it works for them, but doesn't work for us on the smaller business side, if that makes sense, right?

--- *Type of work ends* ---

ROBERT

6:06 A lot of it overkill for what we need. We're operating on, you know, they're operating on two 300,000,000. Maybe we're operate on 10, 15,000,000, right? So it's a little different, yeah.

MEDA

6:17 Okay. Got you. So how long have you guys been on ms?

19168783808

6:25 We have been?

--- *Type of work* ---

ROBERT

6:26 I go ahead. You probably have better knowledge on this, at least five years. So, TAM, for seven years.



MEDA

6:36 Gotcha. And I'm assuming in that time, you guys have grown tech, count revenue, et cetera. So it does kinda seem like you're at a point where you know, you can send you with the software or you go to a new software that you can kind of continually grow or kind of maintain. So, is that.

--- *Type of work ends* ---

ROBERT

6:54 The goal?

MEDA

6:54 To grow or maintain?

ROBERT

6:57 It's both to maintain and grow. So right now, we're we need to be able to maintain what we have because we've already kinda grown out of this other platform. So a little bit of black, but definitely we're having we're looking for the future as we grow to implement this.

--- *Pricing* ---

ROBERT

7:11 So we're well versed in this as we grow. I mean, we're looking to definitely grow. I mean, our outlook probably the next five years is adding, you know, probably 10 to maybe 15 technicians. So obviously we need to be prepared for that as we're bringing them on in that time frame.

--- *Type of work* ---

MEDA

7:25 Yeah, yeah, absolutely. And having a software in place that's not maybe, so outdated can definitely help with that as well. Tell me about the type of work that you guys are doing. It's all H, back all commercial.

ROBERT

7:38 Yeah, all each commercial industrial.

MEDA

7:43 Cool. And do you guys do a ton of preventative maintenance?

--- *Recurring maintenance* ---

ROBERT

7:48 Yes, we do credit maintenance service, calls, repairs. You have everything under hvac service.

MEDA

7:53 Cool. And I'm assuming you have those contracts set in place or is it more just like a, it's a recurring service, but we don't have like a contract in place for that?

ROBERT

8:02 We have contracts in place.

--- *Type of work* ---

ROBERT

8:04 So we have contracts in place for our maintenance customers. And then we have some customers who self perform who have facilities personnel and they call us in on overflow work or, you know, things that they can't really kinda out of their realm.

MEDA

8:16 Okay. And you mentioned you guys have... my gosh, this words getting away from me a Construction side, Jesus, a Construction side and a service side. And I'm assuming your Construction is a larger side of the service. Any other sides of the business that I need to be aware of?

ROBERT

8:35 No, no, that's it. So just to hvac, but yeah, we have a Construction side in our service side.

--- *Type of work ends* ---

MEDA

8:42 Okay. So general reporting, having an overview of the business as well as being able to quote in the field, what else are you guys looking for today?

ROBERT

8:53 That's a big thing. I mean, having the dashboard. So we've been with M, SI, trying to work with them through it's. Been a couple of years trying to get them to give us a dashboard, just kind of an overview of everything, right? Overview of the business. Hey, where are the guys are at today? Hey, is this, you know, this quote gets sent just an overview of kind of everything we do we're looking for to be kind of all in one area instead of having to go and open several programs to get back to what we need. And then it becomes very cumbersome. Yeah.

--- *Purchase decision* ---

MEDA

9:19 Yeah, absolutely. Awesome. Okay. This seems like you guys would be a great fit. I'll show you the tool here in a second in terms of like a timeline of adoption. What does that look like for you guys?

ROBERT

9:35 So in the next couple of months right now, we're trying to get through summer, right? As, you know, it's our busy time. We're all we're all going and we're growing in between that. So, you know, all the growing pains and everything else that's going on. So probably in the next couple of months because of what we're looking for. So probably around the fall time, I'd say.

--- *Purchase decision ends* ---

MEDA

9:52 Okay. So you guys aren't locked into a contract with ms? I?

ROBERT

9:57 No, right right now, we're on a month to month. So cool. And then Theresa, if you wanna add, do you wanna add anything for accounting that you're looking for? Like invoicing? I didn't let you speak so much.

--- *Accounting integrations* ---

19168783808

10:13 I don't know how this would work with vista. You guys integrate with vista, correct?

MEDA

10:19 Can, so we have an open API, so we're able to integrate with really any software that also has an open API, which is no software is out there. I will say though 40 percent of our customers do not integrate their softwares with their accounting system. So it's definitely something that I can show you if you want an integration. If not, it is a larger cost. I wanna go ahead and be up front about that. It, it kinda doubles the price of the software and of itself. I am not extremely knowledgeable about accounting. I can show you the basics, but I can definitely set you up with our in house team that kinda handles all of the accounting integrations and things like that. So if we need to meet about that integration, we'll set up time with Tonya, our director of partnerships and she can kinda discuss that a little bit further. Okay?

--- *Invoicing* ---

19168783808

11:13 It would definitely have to integrate with.

MEDA

11:18 Okay. That's absolutely no problem. So what I'll do I'll show you kind of, what the integration looks like from a service trade point of view, and how you would send

over all this information and then, or how it would automatically do it. And then I will send you some material to review. And from there, we can set up time with the accounting team to go over the actual specifics of the integration, if that's okay with you.

ROBERT

11:47 Good. Okay.

19168783808

11:48 Cool. Can we invoice directly off... the?

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

MEDA

12:04 If we can, if we can invoice with our software? Yeah. Okay. Yeah, we can do everything from the creation of scheduling all the way to invoicing.

19168783808

12:17 And purchase orders?

MEDA

12:20 So we don't generate purchase orders. There's a couple of different ways that our folks do that in our software.

--- *Parts management (inventory)* ---

MEDA

12:26 So we do have a full product suite. I don't wanna get too confusing with that. Today. We have a secondary product that handles the selling and buying of items as well as creating purchase orders, things like that, that's called partsledger. What we're going to discuss today is our core functionality.

--- *Parts management (inventory) ends* ---

MEDA

12:45 And if there's any add ons from there that you guys don't see, we can definitely scope out, you know, a po system and things like that. Are you guys not doing your POS in your accounting system right now?

19168783808

12:59 No, we are, but that was one of the things you wanted to be able to do off of.

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

ROBERT

13:05 This is a part of the discussion. We're talking about just having everything all in one platform as opposed to.

MEDA

13:13 Got you. Most of our folks. We're jumping ahead of here ahead here now, but I'll kinda show you most of our folks use. Let's see this job number as their po number... to keep everything nice and easy. You can also, you have a customer po, you can put in that customer purchase order number if you need it in that form. But when you say POS, are we talking about customer POS? Are we talking about POS for items that you guys are purchasing or?

19168783808

13:54 Yeah. Items that the technician would need?

MEDA

14:04 Yeah. In that case, I would use our job number as our purchase order number. This job number does not repeat. So it's always going to be an identifying number and you can always use a search bar to find that po. And I'll show you how to kind of add that as a line item as well. And tag the po number within that line item to make sure we use that item for that specific job when it does come through.

19168783808

14:31 Alright. I don't...

MEDA

14:40 In that case, unless you guys are interested in partsledger, we do not generate POS and our core application.

ROBERT

14:50 Okay. So we'll go ahead. We'll let you go ahead and get with your presentation. Yeah, we would definitely need partsledger part of it, but yeah, let's get with your part. And then we can discuss that how we would tie that and maybe at the end and we can go from there.

MEDA

15:02 Yeah. Cool.

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

MEDA

15:03 So a little bit of background on us. We currently have over 1,200 active customers servicing about 10 percent of commercial and industrial buildings in the us, which accounts for around 13,000,000 assets under our management. We only work with commercial mechanical and fire and life contractors. So our whole goal over here is to control costs by improving your service and project operations and

setting up your technicians for success as well as growing quality revenues to selling more service agreements and growing profitable customer loyalty.

*--- Customer engagement ---*

MEDA

15:37 We do it in these five ways. We call it our profit platform. At the end of the day, we are an ROI tool. We do it through office coordination, technician, productivity, customer communication, management, visibility, and of course, sales success. So for your office, you guys are going to have everything you need to manage and execute on all your service agreement work from automatically creating work orders when that work is due to summarizing profitability at the end of each term, all the way to renewing agreements when they expire.

*--- ST app contracts and pricing ---*

MEDA

16:08 The overall, it's just gonna help you manage everything from dispatching to invoicing for your service work. And you can apply a budget with change orders, you know, Progress billing for that longer projects work. But I'm assuming that, do you, and this is a question I should have asked.

*--- Type of work ---*

MEDA

16:24 Do you guys do any long term projects? Is that what your install team would be? Or does Construction kinda help out with?

ROBERT

16:33 Construction kinda helps with that. And we do have some long term projects, but long term for us is maybe like a few weeks, couple of weeks. Okay. That actually goes into the month or anything like that.

*--- Parts management (inventory) ---*

MEDA

16:43 Got you. Okay. And then of course, for all that work being done, you guys are easily going to be able to track and manage all those parts being used on the job from those po numbers, warehouses to drugs to job sites. And then of course, we can track technician time by clock in and clock out features.

*--- Assets ---*

MEDA

17:03 And for the technicians, they're gonna get everything that they need in their fingertips that they need to do the job. So we can do tasking lists. They'll have location contacts, complete equipment and location history. And it makes it really

simple for them to record, you know, Rich information like photos videos, any kind of custom forms or paperwork.

*--- Customer engagement ---*

MEDA

17:23 We're able to digitalize that. So you guys can report those equipment issues as well. As we talked about this earlier. You're having your customers be able to sign off on the work in the field, you can invoice them and create field quotes... for customer communication. Your customers will get a lot from you. Is service tray. You're able to share Rich real time updates from the start to finish of each job. You can send them notifications when your technicians are on route to a, you can also send them appointment reminders after job reports, with those photos videos. You know, those paperwork that we talked about earlier as well as you'll be able to offer them a portal where they can access all of this information on demands when they need it. So essentially, what that portal is, it's a portal on your website where folks can request work. They can pay bills online. They can view previous jobs and upcoming jobs as well. So it gives it a little bit more customer centric feel when they have, you know, all that access to you guys as needed. And of course, you know, they can pay those invoices and approve those quotes online as well. And of course, with management visibility, all of your data is gonna be centralized. So you only have to look in one place to understand what's going on. And if you do have any investigative issues, we'll give you a detailed work history to solve that.

*--- Customer engagement ends ---*

MEDA

18:48 Or if you have any internal process issues, we have an audit log as well. And of course, you're going to get some powerful reporting with operational KPI'S to margin performance... that's a little bit of a low down on high level overview. Anybody have any questions before we get into the software?

*--- Access to information ---*

ROBERT

19:11 I think we're good to move on. Okay? Do you have any questions Theresa?

ROBERT

19:21 I think we're good to move on. Okay?

MEDA

19:23 Okay, perfect. So I'm gonna show you three different views today, the office view the technician view and then what your customers will see as well. So let's start off in the office view.

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

MEDA

19:35 This is essentially a high level overview of the different stages of your workflow. So we have our daily schedule here when and where our techs are gonna be. We have overdue jobs without appointments as well as jobs without appointments do in the next two weeks. So this is a good place to see a snapshot of what's upcoming as well as when we set up those preventative maintenance jobs. We wanna make sure that we go out each quarter earlier, however long we need or however often we need to go out. So that will make sure that you guys don't miss any of those jobs. So when you put a due date, they'll come up, you know, two weeks in advance. So, you know, you need to schedule that as well as say you're super busy. You guys need to schedule out an advanced anyways, you can go ahead and create that work order but not put it on a technician calendar until that time comes closer, jobs to be marked complete.

--- Tech On-site ---

MEDA

20:27 And then jobs that need to be invoiced. So if you can see over here, I know you guys were really focused on being able to see kind of where your technicians are, what they're doing, where they're at, in their job. And this is where you can see that is our clock events over here. So we're gonna pin their location when they clock in and when they clock out of the job. So you can see time date stamped with their location as well. And this is all updated in real time. Whenever your technician does something in the field, you're gonna get you're gonna get updated in the office on this side as well.

--- Access to information ---

MEDA

21:03 So it's a real time update. I will say if they're off, if I, if they're underground, it will take a second for it to kick back to you. But your technicians are able to work offline. So I did set up a work order for us to do today.

--- Recurring maintenance ---

MEDA

21:23 We're gonna do and we're still in the office side. So we're gonna do some preventative maintenance on an H fac system. We have a description of our work. We have a scheduling window. This is just a single day window. If this needed to be a multi day that's super easy to do and you can kinda customize that as well.

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

MEDA

21:41 If you know, ahead of time that you're gonna need a part, say you guys already maybe ordered that part. You have a purchase order. You wanna make sure you tie it to this job because you wanna make sure that when that part comes in, we use it for this specific job.

--- Quote templates ---



MEDA

21:55 So we can easily do that here. And I'm just gonna use a widget as an example. So I have a widget in here. I can go ahead and select a source. So what we're gonna do, you can pull it out of a wear hat and let me pause real quick.

--- *Parts management (inventory)* ---

MEDA

22:09 Do you guys have a lot of inventory on hand? Is it mostly you order it when needed? What does that look like for you guys?

ROBERT

22:16 We mostly order the stuff when we need it. They do keep some truck stock on their truck for service calls and things like that. For the most part, we ordered as it's needed.

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

MEDA

22:24 Okay. So what you would do, you would select your parts vendor and we would put all your vendors in here. So say you got it from acne supplies. You're going to enter in that purchase order number that you get from that vendor, and then you can go ahead and select a status. So whether it's been ordered or received yet, let's say we've ordered this and we know the delivery date is going to be next Monday. We can go ahead and date that. So when that part comes in with that purchase order number, we can easily come up here into our search bar, search for that number. It's gonna bring open this work order. So, you know, that part goes with this job and we need to go back out when, you know, that part does come in. Does that kinda makes sense? Is that what you're looking for in terms of POS? Or is it, I know you guys wanted a generation, but would this suffice for, you know, a po system?

ROBERT

23:20 I think that the biggest concern like Teresa has that we have. So our POS are generated through vista. So we need to get from vista and have it somehow tie into this po. So in other words, po is gonna get us, vista is gonna give us a po. And now we may be dealing with now two different POS because now we have to do a po off of what your guys gonna generate. And then that's going to have to be tied back to a vista po, if that makes sense.

MEDA

23:45 Yeah. So we're not gonna generate. Sorry.

19168783808

23:50 No, go ahead. Go ahead.

MEDA

23:52 We wanna be able to generate that po, what I would suggest is generating that po and your vista system and then putting that number into ServiceTrade for that. I will ask if they are the better workaround that's the best I can think of unless you guys get parts ledger.

--- Invoicing ---

ROBERT

24:12 Yeah, because I wanna say Theresa right now for msi, right? When you drop a po, it automatically will populate on their board, right? Like if you cut a po and it automatically go to.

19168783808

24:22 I don't go back before that.

MEDA

24:26 And I believe our integration would be a one way I'll need to double check on that, but I believe service trade will talk to vista, not vice versa, but I will see if that's a two way but I believe it's just a one way integration for them.

--- Forms ---

ROBERT

24:41 Gotcha. Yeah, I'm sure. It's similar to what ms, I have.

MEDA

24:45 Yeah. Do you guys have any like paperwork that you would need and the jobs that maybe a check off list, anything, maybe a custom paperwork that your customers would need you guys to fill out?

19168783808

25:01 Yeah, it's not very often, but we do.

--- Tech On-site ---

MEDA

25:03 Okay. We can easily digitalize that, put that in the software and have that paperwork come up when that type of job is going on and happening. So they know that they need to fill that out. They would, it would obviously be shown here as well. And then any comments you need for the technician can be added there as well. Any questions here before we move on to the technicians?

--- Access to information ---

19168783808

25:25 I... think I...

19168783808

25:33 No.

ROBERT

25:33 I don't think I have any.

MEDA

25:35 We're all good. Okay. Let me switch gears. Now. Are your technicians on iPhones? Androids tablets?

ROBERT

25:44 iPhones, and then we're you know, once we do adopt a new program, we're going to be going on iPad as well.

MEDA

25:50 Okay. Cool. I'm on my iPhone today, so it doesn't matter if you guys are on iPhone android as long as they're at, or, you know, were they using iPad, good to go, let's see.

19168783808

26:03 I'm connected.

MEDA

26:04 But I'm not give me a second guys. I'm sorry?

--- Access to information ends ---

MEDA

26:20 Give me a second. I'm sorry?

MEDA

26:30 All right. Now, we're clicking there. We go. Okay. So when your technicians log in for the day, what they're gonna do is open their app and they're gonna see all the jobs that are scheduled for them for that day. This is the same job that we have that we were showing you guys in the office, they would click in here.

--- Tech On-site ---

MEDA

26:51 And their first step would obviously be to clock in. So we get that notification in the office of their location. They can also clock in saying they're on route. If you guys

want to track that drive time as well as they can easily notify the customer in here of their EPA.

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

MEDA

27:07 Now, you guys mentioned having, you know, quoting in the field, getting those sign off, would you say that most of your customers are on site when you guys are in the field?

ROBERT

27:19 Yes, I would say for the most part, I'd say good, probably more than the last. So probably good 75 80 percent.

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

MEDA

27:25 Awesome. So, would you guys need a pre work, sign off, a post work sign off or maybe both?

ROBERT

27:35 Maybe maybe both. Usually both. I mean, as we get new customers, right? We have relationship with customers we have now, but as we mean, new customers, yeah, pre work and post work authorization would be good.

MEDA

27:46 Yeah, yeah, absolutely. So it's really easy for that to be generated in here. So if we need a pre work authorization, what that does, they can click on that and it's already pulling over my service and my job items that we saw in the office. So it's not something crazy that they have to go ahead and build out.

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

MEDA

28:04 All they have to do is go ahead and review that. And what happens is they can send it to your customer or share with the customer right there. And then they can go ahead and sign off on it. And that gets emailed to the customer and to you guys.

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

MEDA

28:18 So you guys already have that pre work authorization in there as well as you, if you need a post work acknowledgement, it's essentially the same walkthrough. It's going to generate all the information, all the work that you did up here for that service and push it into the post working acknowledgement as like a recap.

--- Tech On-site ends ---

MEDA

28:35 And then all they have to do is kind of send it off to the customer and they'll sign right there. Of course, everything in our system is permission based. If you have maybe a couple of let's say, new hires, maybe you don't want them to generate the invoice in the field, things like that.

--- Tech On-site ---

MEDA

28:54 Everything's permission based. So we can kinda dictate what they're able to do within here. But the first step the technician would do, of course, sign in and then they go to their services and see what they need to perform that day. So they'd see a description of the service, see what they need to complete. If there is any kind of paperwork, any kind of check off list, it would be here in this paperwork section and it's same thing. It has smart roles like our pre work authorization, our post work acknowledgment, where it's gonna gather the data about the location, the technician, the service.

--- Assets ---

MEDA

29:28 And then all they have to do is check off the boxes of the things that they've done and maybe write a comment in there too. Same thing with comments up here. If they, you know, need a gate code building map, those can be held here. So this is a comment for the entire location.

--- Quote templates ---

MEDA

29:44 But your technician can also send you a comment in the office. You have your own site contacts, of course there. And then our job items. So if we need to add a part and an item, say they pick off something from the truck, what we're gonna do is we're gonna get an itemized list of the inventory that you guys do have on hand with an, any pricing roles that you do have for that and they're gonna be able to pull it off here with those pricing roles. All they do is say select, let's click this first one. We don't have any pricing roles in here, but let's pretend... it's not gonna be a dollar. We're gonna add that in there. If I needed to add, say a miscellaneous item, maybe I'm going to home depot or something like that and we don't have it in our list.

--- Parts management (inventory) ---

MEDA

30:37 They can easily add an item in here as well. Of course, within these items, I can also select my item source so I can tell if I got it off a truck or if they need to enter that part's, vendor information as well.

MEDA

30:58 We've added that item in there.

--- Assets ---

MEDA

31:01 Now, what's also really great is our assets in here. We're gonna have complete asset history. So, if they wanna look into this H back unit, what they're able to do is see all the details of that unit below as well as they're going to be able to search into the service history and the deficiencies.

--- Deficiencies ---

MEDA

31:19 So if we wanna see, you know, one of the last time we had a broken compressor, maybe your technician is noticing that they're going out a lot for this one specific thing. What they're able to do is just look into their history and it's gonna make that repair and replace conversation a little bit easier if they're able to show that on hand. Any questions so far?

--- Accounting integrations ---

ROBERT

31:47 How is this?

MEDA

31:50 Okay. How does this compare to what you guys are currently doing?

ROBERT

31:56 Yeah, we don't have anything like this. Now, some of the other ones we've looked at because obviously, we've been looking at a couple of different programs similar to this. There's some that are similar to this?

--- Accounting integrations ends ---

MEDA

32:06 Yeah. What are you guys looking at?

ROBERT

32:09 So, we've got engaged BuildOps. Okay, cool. So BuildOps and then you guys, and then we did go through msiproten, but we've been having a lot of issues with them with support. So that, they kinda moved themselves out of the conversation kind of because of unfortunately, the lack of support.

--- Tech On-site ---

MEDA

32:31 Gotcha. Was it just, they were kinda ghosting you or?

19168783808

32:35 Yeah.

ROBERT

32:38 Go ahead Theresa, yes, she has.

19168783808

32:40 Same issue with not getting work orders from the technician. So, I don't know the missions they fill out their work order, and then they hit complete. The work order comes to Robert and myself.

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

19168783808

32:52 We have not been getting those work orders for the last three months. My God and our it department has engaged their it and it doesn't seem like they ever have time for us.

MEDA

33:08 Sorry?

19168783808

33:08 On the.

MEDA

33:13 I can't imagine you guys are the only ones that are running into that and that's a huge problem. Do you guys think you're missing revenue from that as well?

ROBERT

33:24 So much revenue, but oversight, I mean, a lot of it. Okay. So now we have to go in when the technicians get everything done instead of getting the reports e-mail now, we have to go on the vista, find the report, find the note. It just, you know, we're already strapped for time and this is, yeah, so.

19168783808

33:40 Exactly. And so the other thing is a long time. The time line is waste of time. Is I'm having to replicate those reports. So I'm trying, I have to go in, find an old report and use that as a template and erase everything in there, and then add the notes to that so I can send it over to a client because some of our clients require the work orders, they need service report or files. So, you know, I had to do three of them yesterday. So that's a huge time waste.

MEDA

34:13 Yeah, that's I mean, that sucks that's your whole entire day. I'm right there and that's gonna be happening that's I'm so sorry that's terrible good on you guys for trying to give msiprotin another shot. You guys are better than me, but yeah, that's completely unfortunate and should not be happening and shocked.

--- *Customer engagement* ---

MEDA

34:35 I haven't heard more about that. Honestly. Yeah, that's I'm kinda blown away anyways. So another, so really the biggest hitter for us is a pull, it's pulled through revenue. Do you guys, would you guys say you get a lot of revenue from that pool through work that you guys do. So say your on site you? Yeah, yeah. And you'll have a way to kind of log that?

--- *Forms* ---

ROBERT

35:04 Yeah, that's most of our revenue that we want. We definitely see there's ways to improve on that by making obviously things easier on the technicians as far as on the spot quoting and things like that. So, right now, the way it happens is they have a pink form that filled out and it's not through ms I or anything. So it's basically an additional form they have to fill out of. It's. Not done through the platform at all?

--- *Forms ends* ---

MEDA

35:25 Yeah. So you guys are just all over the place in terms of things that you have to do throughout the day. It's not streamlined gotcha.

ROBERT

35:33 Yeah, no, not at all. And the thing is Teresa has been trying to lead the charge and getting them in line. They haven't they haven't really done much and I don't have time. She doesn't have time and get to the point where we should just have a product that works and we shouldn't have to Chase this one down for support. So.

MEDA

35:49 Yeah. I mean, you've been using a product for six to seven years. You would think that they would do anything they can to keep you as a happy customer since you're a longstanding customer, right?

--- *Deficiencies* ---

MEDA

36:00 Yeah, absolutely. So in order to document that pull through revenue, whether you guys were able to fix it in the field right then or you need to go back out, it's super easy to do it. We're gonna go into efficiencies right here. It's what we call



repairs. So again, you see all the previous deficiencies for this location, then you're just gonna go down here to add efficiency and that's how you're gonna log it. So gonna be pulled up to this screen. Now, I don't have to have a huge description of the problem because, and I can't even. So what I'm able to do is add attachments. So if we're able to fix it in the field, right? Then I could put some before and after photos, I could submit videos. I could even do a voice memo if I wanted to. Maybe we weren't able to fix it right? Then. Maybe we need to order apart. So we're just gonna take a photo and we're like, yeah, definitely a broken compressor but these photos are great to send to your customer, right? It helps them visualize it a little bit more kind of adds to the trust that relationship that you guys have. You can add as many attachments that you want on there. You can also mark the severity. So whether it's an operable deficient or just a suggested repair. So let's say today we have an operable system. We're gonna tie it back to the asset because we really want a clean clear asset history. It's another huge hitter for the software. So we're going to tie it back to that hvac unit that we're working on. And then we're gonna market mark the status. So if we were able to fix it in the field, of course, we would say fix if it's a new repair that we found that we weren't able to do right then and there, we need to go back out because we have that part on order. We would say no. And then of course, our proposed solution... to order part XYZ and come back out, you know, hopefully they're going to give you a better description than I just did right there. But that's simple. It took us a minute or two to go through that and log all those details. And it makes it super simple as soon as I hit save. The office is already getting notified of this.

MEDA

38:21 The office is already getting notified what happened at which location during what job and what that proposed solution is. But I wanna show you guys the workflow of what it would look like to do a quote in the field and kind of get this signed off. So we could create a work acknowledgement or we can go into view more detail.

--- Quote templates ---

MEDA

38:46 Let's see. So what this does, it kinda summarizes everything that we did the service that I completed the job items down there and they can easily go in and adjust this. We have those hvac unit, all the description of that. And then right down here, is that repair that we have. So I gathered all of this information for them. They didn't have to type this out or create anything. What they're gonna do is they're going to go into actions and create a new quote. So if you guys have any templates prebuilt in here, you can go ahead and apply that template there as well as if you have contracts.

--- ST app contracts and pricing ---

MEDA

39:28 So you mentioned earlier, and let me make sure I didn't hear you. You have contracts for different customers for your, you know, preventive maintenance, things like that. Do you have different pricing contracts within that different mark up rules for different customers? Things like that? Yep?

ROBERT

39:45 Okay. Yes, there's different hourly rates things.

*--- Recurring maintenance ---*

ROBERT

39:48 Yes. Okay. So when the geographical area that, we cover the, you know, all of northern California. So that alone is different rates.

MEDA

39:57 Okay. So we will set up different contracts for different kinds of things with all those stipulations in there. Now whenever you go out and let's say we do preventative maintenance on the H back unit at this particular location, this contract can always be pulled up. So if you want to always have a contract for this certain kinds of job for this certain kind of location, we can tie that in there and already have it automatically pulled up. If I needed to pull up a different contract, I could search and find that as well.

*--- Quote templates ---*

MEDA

40:29 So these are things that we would build out the service template and the contract that's something we're going to build out an onboarding. It's going to be customizable of course to you guys because everyone's different. So from there, I'm just gonna save this. And now we have our quote drafted out.

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

MEDA

40:47 We have our sales tax that's already getting pulled in. All of our contract mark up rules are in there, we have our files and photos and our terms and conditions. So from there, we can just go ahead and send this out to our customer so we can e-mail it right to our customer. Through here. What that does is that's gonna e-mail you guys in the office, a copy as well as the customer. So you could send out a quote like that or you can come through and create a work acknowledgment... through here. Again with the deficiency that we had any files and photos, any job, items, things like that... and get those sign offs in the field.

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

MEDA

41:34 So if I wanted to come through this way and just do a work acknowledgement on the service and the deficiency and the parts and items. What I would do is hand my phone to my customer. At this point, they'd mark off this, confirm and sign first date, last name, e-mail address.

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

MEDA

41:51 And that's a digital signature. Let me show you what that looks like. Your customer would come through here. Let me put a big.

MEDA

42:07 Sign off... and all of you guys are getting notified of that.

ROBERT

42:15 One thing I noticed. So when they are sending the quote, you said they would send it would go to the customer, go to us.

--- Quoting ---

ROBERT

42:22 But there is a way because I wouldn't want them to send it directly to the customer. And before we've overviewed it or had oversight on it.

MEDA

42:29 So in that case, I wouldn't generate quotes that way. This is how I would generate quotes. You would come through and you get that e-mail of that deficiency being reported. So this can be sent to whoever you want it to be sent to. I'm annoying and I'm sending it to, you know, half of my team, right? If you want one person to be dedicated to do this, absolutely, maybe a couple of people, whoever will set that up for you guys.

--- Deficiencies ---

MEDA

42:59 But this is a record of what was found at which location during what job, but they're gonna click this link right here. What that does is it brings you back into service trade, you can get that full report.

ROBERT

43:13 Okay. Gotcha. And granted, we do wanna do quoting in the field. So we do want some of the guys that'll be limited, right? Obviously senior guys will have access to it. Where the younger guys are coming up. We want to have oversight on their stuff before we just cut them loose.

MEDA

43:26 Yep. And I would definitely agree that's what I would suggest. So we have our reports here, you know, the broken compressor that we found. This is still of course tied to our service job. We have all those deficiencies in here as well. So if you need that, we quoted in the fields, that quote is already built out for me in here. Any comments my technician left and any attachments will be found here as well. So if they did any kind of paperwork, any photos, any voice memos they took in the field

will all be found here. So let's pretend like we haven't already quoted this job out and let's quote it now.

--- Quote templates ---

MEDA

44:07 So this is how I would suggest doing it if, you know, for those folks that you want more managerial oversight for their quotes? Again, I can pull down the contract that I want or have it automatically applied for the certain kinds of job and go ahead and create the quote from there. So I talked about applying quote templates earlier. This is something that will do in onboarding, and it just makes your quote process a little bit easier. Especially those jobs that you're doing recurring. We don't want, you know, Theresa or whoever to have to go through and create these quotes every single time. So let's just apply templates. Maybe that's a blanket one that you have across for all jobs. Maybe it's customizable for certain jobs that you do. Maybe you just add maybe five or six of those recurring typical jobs that you guys do and you can go ahead and apply that template. What it does is it applies this quote description in here. And of course, that contract that I applied these mark up rules as well. So this is what a quote would look like drafted out from the office side. Now, of course you can come in here and adjust any kind of pricing.

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

MEDA

45:23 I have it on grand total only if you want it summarized by line item. However you want this to look, it's easily customizable. Let's do line items and crisis for you guys to have a full breakdown of that. And then from here, we would send it to our customer.

--- Quote templates ---

ROBERT

45:43 And are the quote descriptions you have? Are those editable? So in other words, you guys have a quote description and say if we wanted to add, okay, we could add things to it as we needed. Okay. Yeah. Sometimes that's a good base, right? It's always a good base. And then just adding the particulars to the might, you know, things that might be particular to the account.

MEDA

46:02 That's and that's typically what we suggest, right? Just like each of you guys are a little bit different. Your customers are all a little bit different too. So they might have a little bit more needs. So absolutely, you can kinda customize that quote description, apply it and then customize it for that customer.

ROBERT

46:20 We wanted to write descriptions because we do this kind of where a lot of them where I write they'll be the same. Yeah, is there a way for us to write our save them in here and do the same thing?

MEDA

46:31 Yup. And then they would just come down here and a drop down and you could apply.

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

MEDA

46:38 Okay. So we're gonna send this to our customer. Any comments we wanna toggle off? You know, any voice memos? Anything like that, you can tag them, toggle them off and not send them on an individual basis. Usually, I'd send this to, you know, my customer and what it would have is a approved button and a big request changes button. I just for time sakes, today, I just view that full screen for us but that's what it would look like. If a customer did get this, it would have a review or approve and a big request changes button over here. But what this would show is obviously your logo up here, a description of the work. I did a full part labor an item break out if you just want a grand total. However you want this to look, of course, can be tailored down. And then our files and photos and any kind of comments, terms and conditions will be down at the bottom. How does this compare to the quotes that you guys are sending out now?

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

ROBERT

47:47 I'd say it's... a little similar. I mean, besides the fact this is gonna take a lot less work right now. What is having to do is having to do a lot, going a lot and enter a lot of things manually obviously and work around. So, yeah, I populates all the time like this.

*--- Quote templates ---*

MEDA

48:05 Yeah, that's I was just about to ask you, Theresa, how much time saving like you saw us? Just apply that quote template and get that quote out in the matter of seconds. How would that change your workday?

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

MEDA

48:31 Are you still there? I lose you guys.

19168783808

48:34 I'm sorry, that would be nice. It's nice how we manually do them now and well, not, they're done in another part of the system, but they're not attached to the work order.

MEDA

48:48 So that would be... yeah, yeah, absolutely.

19168783808

48:52 The technician goes to the, or anyone goes to the work order, you can see everything that's attached to it, quote the parts you said, and.

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

MEDA

49:02 Absolutely. Yeah. This, this will be a huge hit for some more centralized data as well as efficiencies to put it in place, and get the, you know, money back in the business a little bit faster.

19168783808

49:16 Yeah.

MEDA

49:17 So, I'm just gonna manually approve that for us. So you have a question? I'm sorry, I didn't mean to cut you off.

*--- Quoting ---*

19168783808

49:22 No, no, no, no, I'm just agreeing it more.

MEDA

49:27 So you will get a Rich history of this as well. So if you have a customer that comes to you guys and, you know, like I didn't improve this quote, you can easily pull that up time stamps with the person's e-mail and all that stuff.

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

MEDA

49:41 So from here, we could go ahead and, you know, create a new job or just add this to the existing job. So if you guys wanted to go ahead and invoice for that one visit that you had and then open up a second visit, you can do that. But what most of our customers do is just add this to an existing job. So I have a job, we need to go back out and do that second visit. Remember, we couldn't do that full service here because we had to order that part. We know it's gonna come in on this certain date, we need to schedule a second appointment to go back out.

*--- Recurring maintenance ---*

MEDA

50:17 So we're still under the same job work order, but you can have multiple appointments. So if you have multiple visits, maybe you just want to invoice at the end of the month, however you wanna do that, you can have multiple appointments

under the same work order to keep all that job, you know, all straight altogether in one place.

--- Dispatch ---

MEDA

50:37 Now, in terms of scheduling this job, of course, we have a scheduling and dispatch board, I'll show you it's super easy to go ahead and schedule this out. If you know those kinds of details, we know it's coming in on Monday. Let's say we're gonna put this job on Tuesday.

--- Tech On-site ---

MEDA

50:53 So that's scheduled to go out already. Now, all those parts and items that we used earlier are down here added. We have a clock event. Of course, looks like I didn't clock out. So we'll notify you guys if you didn't clock out as well. As if your technician is like me and is 127 point eight Miles away from the location they're actually servicing.

--- Assets ---

MEDA

51:20 We have, of course, our asset record here. Our deficiency record is all down here. If they invoice in the field that would show up there. We have that one comment gate code. Any technician comment will come up here. And of course our attachment. And this is actually our work acknowledgement that we did.

--- Assets ends ---

MEDA

51:42 You can see here we have.

ROBERT

51:45 Yes. So just real quick to go back when you said about adding the jobs together. So in other words, instead of invoicing the one, you're saying that when you add the jobs together, it becomes one big job and invoices under one one job number, as opposed to invoice differently.

--- Deficiencies ---

MEDA

52:02 Correct. I mean, if you wanna invoice after every single visit, you can do that.

ROBERT

52:09 Sometimes we have something we say, you know, we go, we have a compressor that's failed, right? Change out the compressor, and then, okay, got the compressor going. Now, we found the issue was something else that we couldn't find out before we change the compressor, right?

--- Deficiencies ends ---

ROBERT

52:21 Like a TV is now failed. So, what we'd like to do on some of those that's where this would help. So, you're saying that that's what we could do on jobs like that. That's what we could do is just combine the invoices and it would become one job.

MEDA

52:33 Correct. Yep. Absolutely.

19168783808

52:36 And the work?

MEDA

52:39 Yes. So from here, we, yeah, you have a question? I'm sorry?

ROBERT

52:48 Yeah, that would definitely be helpful for us. There's a lot of times where we have things like that, so.

MEDA

52:53 Awesome.

19168783808

52:54 Everything together.

MEDA

52:56 Yeah, absolutely. It makes it easier to find things that's for sure.

--- Assets ---

MEDA

53:00 And one thing I didn't mention earlier that I actually wanna show you guys is this asset right here. So, like I showed you earlier, you're gonna have full asset records in here with those details and everything like that. But if I wanna search into my jobs and say, when's the last time we did preventative maintenance, I'm just typing in pre and all of that's coming up, every single work that we've ever done, or every single job that we've ever done preventative maintenance on.



--- Deficiencies ---

MEDA

53:29 All of those details are pulling as well as your invoice details. If I wanna look at, let's say when the last time we had a compressor replacement or a broken compressor, I can start typing that in and pulling all those details. So it does make it really easy to search for things in the software if needed.

--- Tech On-site ---

MEDA

53:56 So, from here, let's go ahead, let's complete the job. We did that second visit. Let's go ahead and create the work order. Sorry, create the work order. It is late in the day. Great our end. I'm losing it at this point.

19168783808

54:11 So, like my computer 50 like two?

--- Tech On-site ends ---

MEDA

54:16 Yeah, it's 516 here, but don't worry about that. I work west coast.

MEDA

54:25 Yep. Let's see. Let's go ahead and complete this. Okay? Let's reload this. Sorry, we have what's going on as service trade days where our whole entire company flies in. Let's try to do this in two steps. Okay? I'm gonna separate these steps out to make it easier for us. We have everyone in the company flying in this week. We call it service trade days. We have a quarterly business review and we do some volunteer hours. We all go to a base.

19168783808

54:53 The ball games together.

MEDA

54:54 So, we've never had this many people in our office except for during, you know, this one week and our internet sure do suffer from it.

19168783808

55:02 Yeah. All right. That.

MEDA

55:04 Yeah. So let's go ahead and invoice this job. Man. Usually, you would do that all in one step. I'm separating it out because the bandwidth of our internet is a little crazy right now.

--- Quote templates ---

MEDA

55:16 If we need to put a net 30 net 90 net 60. However you wanna do those payment terms, you can easily apply that across the board or maybe just specific companies. If you need to adjust anything in your pricing, you can easily do that here because I don't like that gross margin. I'm gonna do.

--- Quote templates ends ---

19168783808

55:35 I was just gonna say.

MEDA

55:37 You didn't like that. Either. I did that's...

19168783808

55:40 I like Robert didn't say anything.

ROBERT

55:42 I was waiting, I was waiting, I absolutely. No, I.

MEDA

55:50 Lady, right? The.

ROBERT

55:51 Red... red or black?

MEDA

55:57 So you can see pretty immediately if your gross margins in the red, there's something that we need to do here, right?

--- Quote templates ---

MEDA

56:04 So you can easily adjust that... and, you know, line items of prices, if you want to group this by service or have no grouping and just have all the line items in a list. However you wanna do that, you can easily just pick one of these and apply that. So I'm gonna do a line item type with detail just to show you what that looks like. If we needed to add in the invoice, the items we could get to go ahead and save that. If you have an invoice note, you can of course, add that there... what's really cool.

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

MEDA

56:36 And I'm gonna show you guys this before I show you what the invoice looks like is our service link. Actually, I'll just show it to you all at one time. So when we're invoicing a customer, you can have this look a couple of different ways, right? If you want all these to be listed out, all in one, I have this split up between material, labor, parts and equipment. However you want this to look, we can easily do that. You know, of course, you're going to have your logo up here. Your customers can go ahead and pay now.

--- *Type of work* ---

MEDA

57:09 And then you have, you know, the service that you did the preventative maintenance. So we have our preventative maintenance down here as well as our repair up here. And then your terms and conditions at the bottom. So something that's pretty unique to our software is the service details right here.

--- *Dispatch* ---

MEDA

57:31 This can be sent out at any time during the job, whether you want it to be before the job to send your customers. So they have an idea of what's upcoming, who's coming out their appointment times, what services they have, things like that. If you want to send this as a Progress check, what's really cool is as you can see these are all the checked off here, which means I went to those two visits.

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

MEDA

57:53 We've already completed both of those appointments. If you wanted to send this out as a Progress check, let's say after our July 20 fifth visit and we haven't gone to that August first visit yet. You could easily do that because this would be checked off and your second visit because you haven't done it yet, would it be checked off yet? So it is just kinda like a Progress check on what's been going on during those jobs. Maybe for those two week jobs that you guys have could be good to send out to your customers. So they know, kind of what's going on day to day as well as, you know, you have your service details down here, parts and items, any kind of attachments, you know, your deficiencies, we had a form right here.

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

MEDA

58:35 Our work acknowledgement is going to be sent as well. They'll have that complete record, just a little bit more customer centric than saying, hey pay this invoice here's. Some details of the service that we completed today.

MEDA

58:51 And that's it that's essentially a high level overview of the core product of service trade and what we're able to accomplish in there.

--- *Purchase decision* ---

MEDA

59:04 Any questions you guys have? Anything you wanna dive into right now? I do have a little bit more time you guys wanna do that.

ROBERT

59:14 So, just if we could talk by a pay structure and things like that, is your guys subscription fees and things like that. So I know you said implementation would be obviously a different fee, but the, that we looked at, would that be accurate now, if you could pull it up?

--- *Pricing* ---

ROBERT

59:30 We have like there it goes right there. So, without implementation, is this what it would be there? Is there a one time fee or anything like that? Or is this would be just however many users times this amount per month?

MEDA

59:44 It would be that plus your implementation fee?

--- *Accounting* ---

ROBERT

59:50 Gotcha. Okay. And implementation is that and that's what a lot of this I think would hinge on is us being able to implement where like you said, we're vista, it's one thing if you guys can't write back to vista, but vista writing you guys in other words, we're releasing job numbers and things like that because that's right now, where does generate our, vista does generate our work order numbers and vista does generate our po... numbers.

MEDA

1:00:18 It with service trade, they would not generate your work order numbers with service trade.

ROBERT

1:00:25 Gotcha. Okay. So there's no way. So even if we got implementation, there's no way for the service trade, we would have to match the job numbers in service trade with the job numbers that were coming from vista, correct? Even with implementation.

--- *Invoicing* ---

MEDA

1:00:39 Yeah. But with the, so if you guys do the integration with that, there's going to be identifying details when you send this information over. But let me double check. I don't believe... that the number that service trades number would match vistas if vista generated a different number. But that's definitely something that I can talk to Tania about for that integration to kind of determine that.

--- Accounting ---

ROBERT

1:01:09 Yeah.

19168783808

1:01:09 Yeah. Somehow they use the numbers that are.

ROBERT

1:01:16 Well, like vista right now, right? Like when you do vista three. So you create a work order and automatically that work order goes and populates on ms, I, right? So that's what I mean is in other words, if you can't populate an order from vista, like get through vista, and then it doesn't show up, on their software as the same number. Now, we're going to be possibly cross referencing numbers.

--- Invoicing ---

MEDA

1:01:37 Yeah. So what I believe the workflow would be is to start in service trade, start that work order here and then push that information over to vista. But again, let me double check what our support says and what our integration partner says about the best workflow for that. Okay?

ROBERT

1:02:00 Say, those are definitely the questions when you say Theresa about the integration and things like that.

19168783808

1:02:12 I have to go in the number work orders.

19168783808

1:02:21 If we can't get it to integrate into those. And, and yeah, I mean, yeah, it would be... integrate into vista or like... invoice and accounting looks at the invoices.

--- Accounting integrations ---

19168783808

1:02:38 They do an agent report that's how I follow up with clients and do collection... gotcha. Integrating this with our vista is.

ROBERT

1:02:53 It's gonna be pretty important because, yeah, getting this will be, you know, we're not trying to obviously create now issues for other people because there is, who do accounting on our, you know, the higher level accounting. So we're not trying to create issues for them as well. By now, our numbers aren't matching. And now it's become, you know, worse than where we were at 100 percent.

MEDA

1:03:13 I totally agree. We definitely don't wanna mess with accounting. Let's say, so, I think the other than, you know, that accounting leg of things, how do you guys feel about service trade as a whole?

*--- Purchase decision ---*

ROBERT

1:03:30 Definitely. I think the, I think it was good. There's definitely a lot of things that would mean immediately improve what we have going. I mean, day one, if we can get everything kinda dialed in. So.

MEDA

1:03:41 Yeah, yeah, absolutely. So let me take these questions to Tania, see if I can go ahead and get them answered or would you guys feel more?

19168783808

1:03:50 Comfortable just going.

MEDA

1:03:51 Ahead and setting up that meeting to talk with her if you.

19168783808

1:03:55 But if you get with her and then.

ROBERT

1:03:57 As long as we're kind of on the same page with everything, then we can go forward to the meeting after you kind of maybe do a little preliminary asking.

*--- Implementation and ongoing support ---*

19168783808

1:04:03 Yeah, I think that's a great idea. So I can also.

MEDA

1:04:05 So send you guys some materials in the meantime to review... in terms of pricing. I'm suggesting you guys to start out on premium especially if you're getting an integration, you have to start out on premium with enterprise.

*--- Implementation and ongoing support ends ---*

MEDA

1:04:22 The biggest difference that you're getting with that is you can add on Amazon quick site. I would say for what you guys need and what we're looking at so far, you're going to do everything that you can do that you need to do in premium. Especially with that integration.

*--- Pricing ---*

MEDA

1:04:40 I would say let's start out at premium. Is that within, you know, without talking integration pricing just looking at premium, does that fit within the budget?

ROBERT

1:04:51 Yeah. So that's about what we're looking so, okay. And obviously, we'd have to look at integration and all that. So how you guys, how are you guys yearly term setup? So it's just a year to year. I see that it's you know, per month per technician build annually. So, how you guys contracts work? Is it year to year or is it three years? Is there any discount for, you know, more than one year the sign ups, how does that work?

*--- Pricing ends ---*

MEDA

1:05:16 Man, you're already asking me for a discount Robert?

19168783808

1:05:20 Yeah.

MEDA

1:05:22 Theresa is like, yes.

19168783808

1:05:23 He does, but.

ROBERT

1:05:25 One guy... I gotta do, I report to the president. So what I gotta do is once I, hey, we're gonna spend. This is why I like to have my numbers and say, hey, we're gonna spend this.

--- Pricing ---

ROBERT

1:05:36 This is why and even though I know it's in the budget, but this is why and this is why it's going to be great for us. So.

MEDA

1:05:41 Yep, absolutely. We'll have to, we'll definitely do that ROI chat at some point.

ROBERT

1:05:46 Yeah, yep.

MEDA

1:05:47 So in terms of yearly contracts, what you would see is what you would get if you signed a one year contract, it would be a one 39 per month billed annually per technician. Now, if you guys have apprentices, it's a lower rate even than our select account. But I feel like by the time you guys get up and running those technicians might be in good standing with you guys to be able to be, you know, full text. So we'll kinda determine how many you need at that point. But yes, if you are open to signing a multi year deal, I can get creative on pricing. Okay?

--- Pricing ends ---

ROBERT

1:06:28 Yeah. And I just want to know how you guys will build originally first just so I can sell it because I mean, we'd probably start with a one year and then obviously going forward if things work out then we, you know, if we're good, you know, we're not going to be changing this. Obviously, we're looking to build a long term relationship and get our platform just dialed in where it's consistent obviously.

MEDA

1:06:46 Absolutely. Yeah, absolutely. And I know we kinda talked about partsledger a little bit today. We do have a full product suite that you guys can kind of build into as you grow. So you do have a good bit of runway there to start off on premium and build up if needed as needed, which is great.

ROBERT

1:07:05 Yeah, yeah, yeah.

MEDA

1:07:07 Awesome. Okay. Well, let me talk with my team. I'll get your questions answered. Anything I can answer for you guys now?

ROBERT

1:07:17 No, I think I'm good. Unless this, do you have a?



19168783808

1:07:20 No, why is it going to?

MEDA

1:07:23 To you guys? Probably tomorrow? Everyone's kinda tapped out for the day.

ROBERT

1:07:27 And...

MEDA

1:07:30 Is a good time for me to give you guys a call back? Maybe I'll just give you a call Friday if that's all right. I'll get you that information and see if we can set up things from there or if we need to push out, we can.

ROBERT

1:07:41 Yeah, that'll work. Yeah, Friday store.

MEDA

1:07:44 Awesome guys. Well, I appreciate as time today. I think service that would be really great. We got to get those questions answered and kinda iron out a couple of details, but feel free to reach out. You'll get my contact information if you guys need anything.

19168783808

1:07:58 Okay.

ROBERT

1:07:59 Thank you very much. We appreciate it.

MEDA

1:08:01 Yeah, thanks guys. Have a good rest of your day.

19168783808

1:08:04 You too. Thank you. Bye. Thanks bye.

*The End*