



ServiceTrade and Capital Brand Group

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Participants

SERVICETRADE

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OTHER

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Autumn

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Transcript

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

MARK

0:05 Hello? Hey... hey, Chris. I just realized that as my daughter's name on my phone, sorry, my computer audio is not working, so.

CHRIS

0:16 Yeah.

MARK

0:18 Gotcha. And duplicate here.

CHRIS

0:21 Okay. I figured as.

MARK

0:23 It'll be easier to look at it on my computer screen, but I just talk through my phone.

CHRIS

0:28 Yeah, gotcha... gotcha. Alright. So I was alright. So I got you still trying to connect to audio, but... but you're just dialed in as two different people. So.

MARK

0:35 Yeah, exactly how to change my name on here? So.

CHRIS

0:40 No worries.

MARK

0:42 There we go.

MARK

0:48 And do not know if us fan it's gonna join us or not... max... max.

--- Purchase decision ---

MARK

0:55 Our president just told me he... he had something else he had to step out for... but I mean, really, they've kind of told me, you know, this is my baby to... to get going. So.

CHRIS

1:10 Okay. Well, that sounds good. Yeah... I mean, so talk to me a little bit more top of you kind of have a, you know, hey, your baby to start rolling. What... what does that mean? What does that look like, right? From... from that aspect of it?

--- *Type of work* ---

MARK

1:27 So... one second. So basically, I'm starting a service division. And as of this very moment.

MARK

1:46 You know, it's really just me. I have four or five other steamfitters, you know, that I can use a service techs that... I... I think three or maybe before of them are... are and trucks the company itself is more of an own, em, facility support slash, you know, that mostly government contracting that they do... but I've... I've known spend is like our director of operations or, you know, sort of the coordinator for most of what we do.

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

MARK

2:23 I've known him for a while. I worked with him at M core and, you know, the... the ideas, you know, they would get mechanical work and sub it out to other companies name like, you know, paramount where I was before we do a lot of mechanical work with them. And... you know, we're gonna try to keep that in house now. And then, of course, I'm going to go after, you know, whatever other customers work I can get myself.

CHRIS

2:53 Okay. Okay. So I would assume you don't since it's kinda of a startup, you're... you're not obviously not using anything else right now.

--- *Recurring maintenance* ---

CHRIS

3:02 You don't have any sort of... of data right now in... in any database? Do you... meaning customers, locations, items, any... any PMS? None of that lives anywhere, right?

MARK

3:19 No, no. Right now, it's really that's... that's it, it's just... just me and... the, you know, I have some info and contacts and stuff like that, but I really haven't even set up a single job yet.

--- *Purchase decision* ---

MARK

3:35 And I had told them, you know, I'm probably gonna have to write up a temporary PDF ticket or something... to kinda get going depending on when I get some of this work rolling in. Yeah, I've done. I don't wanna say intentionally slow but I haven't been super aggressive it going after work at the moment just because it is, you know, me and I'm start, I'm kinda, I kinda get my hands on a lot it wants all at the same time.

--- *Accounting integrations* ---

MARK

4:04 It's... it's essentially like if I just said screw it, I'm opening my own company, you know? So aside from having an office established and... and some things like, you know, payroll and accounting that I can rely on, it's... it's mostly up to me on what direction we go in.

CHRIS

4:24 Okay. And what do they use for the accounting system?

MARK

4:29 Right now they just have Quickbooks. Okay? And there's another program that they were using for some of their government like gsa work that's called... hippo. I believe, I don't know if you've heard of it. I hadn't heard of it.

--- *Accounting integrations ends* ---

MARK

4:47 I... I briefly played around with it a little bit... but I never, I look, I can turn, never mind. I thought I can turn my camera on, but I guess second, something's off the computer anyways. Yeah. So, you know, we thought maybe I could use that at first just to track jobs and set things up. It's definitely more of a federal, you know, contract support mechanism vehicle, whatever you wanna call it. I'm looking for more of a service software which you know, is what you guys kinda have. Yep. And, you know, we... we did speak with another group the other... the other day and, you know, sort of unique because normally there's this whole integrating bringing all this data over getting set up, you know, multiple text to onboard and ours is a little different. We're looking at, you know, let's get this set from the beginning. There's one system. You know, we're going to do the same from day one and not have any of that and... and onboard everybody else with the exact same system. And... and they realize that... that may be a little more expensive upfront.

--- *Accounting integrations* ---

MARK

6:04 But I know long-term the battles I had with implementing field connect and... and the spectrum accounting software. So... I know... I know what it can mean not to have a single system set up. And, you know, I don't have carte Blanche on what I can spend, but I've got them sold on the idea that, you know, this is definitely something worth doing.

--- Purchase decision ---

CHRIS

6:31 Yeah, sure. Okay. So you said you looked at, so you're looking at something else?

MARK

6:38 Yeah. My... my uncle is doing some consulting with BuildOps.

CHRIS

6:45 Okay.

MARK

6:46 And, you know, he's my uncle, so they... they set us up a demo last week and, you know, they have a nice product to, but, you know, I... I don't think I had seen there's I know, I'd seen yours. I had kinda, I had mentioned your guys a software first just because I remember really liking your platform. So, you know, really just kinda add a Britain's not putting all our eggs in one basket. I wanted to kinda get a look at it, both options and kind of go from there.

--- Purchase decision ends ---

CHRIS

7:18 Okay. Yeah, that sounds good. Okay. Let me share my screen and do you have any questions for... for me on the service trade side?

MARK

7:31 I think so. No, well, what... of course, and dispatching... the big thing is scheduling, dispatching... some... some minor inventory purchase orders, time sheets. Do you guys do time tracking?

--- Forms ---

CHRIS

7:59 Yeah.

MARK

8:02 Yeah. I'd like to integrate that. And then the... the big one for me that we really didn't have a good way of doing a fair amount with the last company was... forms.

And, you know, the... the best example or the... the two... the two primary examples I can get with forms would be... you know, like a maintenance check sheet or a log form for something, you know, like... like when you're doing an inspection and then like an EPA form for recover and refrigerant and stuff like that. There was not an easy way to do that with field and that's something that, you know, I'd really like to have as part of what we use here is, you know, just a way to keep our... our maintenance forums in one place and... and be able to reference them to job numbers or equipment or something.

--- Assets ---

MARK

9:07 The... the way that we had to sort of use them in and feel connect was I can only assigned one piece of equipment to a work order. And so, you know, if I send a guy out, say, to inspect three chillers, I would essentially have to create three separate work orders and work orders where weird in that system because they would all be the same work order number. But I would create three assignments to that work order even if it was the same day, and then assign one piece of equipment to each work order. If I wanted to track, say the time on that piece of equipment which ultimately met. The guys just weren't going to do it because there was difficult.

--- Accounting integrations ---

MARK

9:54 So... ease... ease of use is... is another big one. Not so much from myself because I don't mind, you know, learning a new system or an app or whatever it may be. But, you know, the goal is to have several guys working alongside me here in the... in the near future and I want it to be as pain free as possible.

--- Accounting integrations ends ---

CHRIS

10:17 Okay. Hi. So we'll... we'll talk about that then today, I'll kind of give you a, you know, hey, a recap of service trade, right? Obviously, you've seen service trade. So, if there's something that's repetitive or something that, hey, Chris, I remember this, we're good here. Just kinda say that, right?

--- Access to information ---

CHRIS

10:37 Yep. Yep. But we'll kind of get into, I'm gonna start with the data model, right? And kinda then show location page, and then we'll get into some scheduling dispatching and we'll jump out into the field and kind of show you what the... the technician work order side of things it looks like including, we'll... we'll do like an inspection form or something.

--- Customer engagement ---

MARK

10:58 Okay. Yeah, that would be great.

CHRIS

11:01 So, you can see my screen, right?

MARK

11:03 Yes.

CHRIS

11:05 So, you know, hey, our... our focus here is to make you guys the best customer service provider for your customer that... that we possibly can, right? We kinda want to turn a service business into a customer service business. Yep... go ahead.

MARK

11:21 No. Sorry. I just was saying, yeah, like involuntary.

CHRIS

11:26 Yeah. Yeah. Right. So, so I mean, hey, everything's about customer service today, right? Amazon's change the way customer services proceed. So we want to try to make you the Amazon of your market, right? And... and to do that, obviously, we're going to have... to have some overlap with accounting where, you know, we'll bring in items, customers locations, sounds like this may be a little bit of a manual entry... which might just need to keyboard whacking, but, you know, here's everything we're going to focus on, right?

--- Customer engagement ends ---

CHRIS

11:54 All of your service contracts.

--- Recurring maintenance ---

CHRIS

11:55 So all of your PMS inspections, all of your recurring services will track and service trade your... your quarterly PM, semi annual... annual, PMS or inspections, whatever they need to be scheduling, dispatching, obviously your digital paperwork, right? So that will be all of your inspection forms, checklist, installed, checklist, whatever that needs to be... equipment records, right?

--- Assets ---

CHRIS

12:18 So all of the pieces of the chillers that you guys are out there to service will track a full history on that, whether that be service calls, break fix calls, a PMS inspections,

right? Well, check full history on that and give you guys visibility in the office in the field.

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

CHRIS

12:33 And then really what we try to do is get you guys engage with what your customers are doing digitally. So service reports be sent out to the to your email service history, sent out to your email, right? Have a quote being sent out digitally to your customers, email... our focus on commercial service contractors, right?

--- Type of work ---

CHRIS

12:51 So we're not going to be in the residential space, right? We don't deal with any pest management type companies that strictly guys that are in the building on a regular basis, trying to build report with their customers, right? So it's not a one and done type software platform.

--- Customer engagement ---

CHRIS

13:06 Yeah. Our goal is to help you grow, right? So operating efficiently, kinda thrown all the inspections or PMS up on a map and then let's schedule amount as to what would make sense... keeping customers attract more prospects, right? So what you're looking at here is like a customer portal where they could go to your website, log in, see everything that has ever been down on whatever locations that they're managing, right? Stop the phone calls into the office. It's a hey mark. When was the last time you were here? Will log into your portal and look it up, right? Yeah. Kind of the Amazon... amazon feeling again where people don't want to call you, they just wanna click a button and see...

--- Customer engagement ends ---

MARK

13:46 Yeah. No, that's super important. And that... and that was something that, you know, sort of have a selling point with field connect, at least what I was told. And the reality was if, you know, there wasn't a conscious effort by somebody at the office to make sure all of the work orders got equipment tagged to them.

--- Assets ---

MARK

14:09 It just didn't happen. There was no way to look it up. We were still, you know, to the day I left resorting to, you know, go to your inbox and search for this job site code and sift through 100 tickets to see when the last time you looked on that worked on that piece of equipment. Painful. Yeah, very much.

--- Quoting ---

CHRIS

14:34 Yeah. So, so we can certainly help with that, right customer. Every email address. And I can show you this when we get into service trade would be associated with the location. So whatever location that email addresses on the... the customer would have visibility as to what's you know, past jobs, open quotes, deficiencies been reporting.

--- Customer engagement ---

CHRIS

14:50 And I'll show you what that looks like as well. The other thing that will do really well as targeting more repair opportunities and revenue, right? So, hey, how can we be a revenue generator for... for you guys? So I'm out to do a PM or inspection and we're going to go through this workflow, right?

--- Customer engagement ends ---

CHRIS

15:05 Hey, boom. Something's about to break, take a bunch of pictures that turn that out to a quote and get that quote out to the customer. Any questions on the slides?

MARK

15:17 No, not so far.

CHRIS

15:19 Cool. So inside of service trade will track, you know, your Bill to would be stadium capital management.

--- Recurring maintenance ---

CHRIS

15:26 Whatever that Bill to is right underneath that Bill to, we can have all of your locations, 50 75, 100 locations that all of the work done with those locations gets billed back to this specific conglomerate, whatever property management company, whatever that needs to be, right? And we can go to the came in New York. So you can kind of see what that looks like.

MARK

15:46 Okay.

CHRIS

15:47 Here in a second, probably spring up some memories... hopefully with the big service trade logo.

MARK

15:56 Yeah.

CHRIS

15:58 Right. So, hey, we're out here at the, you know, this is the camden yards location page will track all of your services, right? So it sounds like you might have to do a little bit keyboard whacking to get these in here. But whether they'd be an annual inspection, PM or quarterly inspection, PM, right? We'll track all of those services. So we'll also give you your scheduling window. So when they're do, right? So spring PMS versus fall PMS and you can customize what that scheduling window looks like, meaning specific day or a whole month.

--- Assets ---

CHRIS

16:31 As I continue to scroll down, we'll track all of the jobs that have ever been completed out at this, that I've ever been done out of this specific location here's. All the pieces of equipment that we have out here, right? So here's everything that we have out here. And you can also click and I don't know what's gonna come up on this specific piece of equipment, but we can go to an asset page, right? And this will show us kinds of the detailed information that we need per piece of equipment. So if we had any recurring services that would be here, looks like we don't have, I haven't done anything yet.

--- Recurring maintenance ---

CHRIS

17:03 This is a new location for me but, you know, hey all my jobs deficiencies quotes that are specifically tied to this air compressor would all be here.

MARK

17:13 Gotcha.

CHRIS

17:14 Right. So if we had quarterly PMS, any of our... our PMS or inspections that have been done, they would list right there.

--- Assets ---

CHRIS

17:23 But that's all tied back to that specific piece of equipment. So to your point earlier, right? I can have 10 tailor units and I can create one job, will have 10 services on those 10 specific.

MARK

17:35 Yeah, no, that's... that's great. That's... that's exactly the type of stuff I'm looking for.

--- *Assets ends* ---

MARK

17:40 So that, you know, record keeping becomes more of an automatic function that's something that I have to like, you know, dedicate somebody to because of course, you know, at the beginning here... the... the less overhead I can keep, the better I'm gonna hold off on higher and, you know, or... or using my additional office staff as long as I can.

--- *Deficiencies* ---

CHRIS

18:03 Yep. Yep. So as I scroll down and again, mind you, this is a new location page for me in this demo account, my last one was getting too, you know, too much garbage in there... but hey, all of the deficiencies would live right here, right? So everything that's ever been recorded and I'm gonna show you how will capture deficiencies out in the field.

--- *Quote templates* ---

CHRIS

18:24 All of our quotes would be right here right in from a specific location page. We can go ahead and add a quote and create a quote. But we'll also track all of your contract pricing, right? And when they expire. So all of your market roles dependent on that specific location or company would default to this specific contract pricing rule as well as an expiration date as to when we need to go renew that pricing or renew those recurring services, right?

--- *Assets* ---

CHRIS

18:50 And then any comments to, can be associated with a specific technician or scheduling or billing note, right? So, hey bring a... foot latter and we can make this a technician and the scheduling note and this is only visible to our company, right? So this is an internal note... and then any location documentation, right? So this is kinda where I'm site plans, drawing plans, pictures of the buildings they need to go, whenever kind have attachments you wanna put can live on that location page.

MARK

19:24 Gotcha.

CHRIS

19:27 So, what I did the next thing I'm gonna do is I just took one of these services and turned it into a job, right?

--- Recurring maintenance ---

CHRIS

19:33 For time purposes. So, I think it was, you know, hey, I turn this annual job into this annual service into a job. So kind of getting to it what the digital work or is gonna look like... is, you know, hey, we're out here at this camden yards here's.

--- Assets ---

CHRIS

19:50 Everything that we're supposed to do. And this is what the office is gonna see, right? And I think I can go ahead and add another service to this appointment. So you can see what that kind of looks like. Grab this to your point earlier, right? Hey, I wanna see multiple pieces of equipment on one specific work order, right? So I just do another service up there, just so you can kind of see what that looks like, right? So, hey, now, as I scroll down on this specific PM, I got this rooftop dies northeast. And then I have to do go check this condenser unit, right? Two totally separate pieces of equipment on one work order.

--- Recurring maintenance ---

MARK

20:26 Yeah. So... are those... are those like pre-built or can you create those as you go?

CHRIS

20:34 Both. So.

MARK

20:36 Hello?

CHRIS

20:37 For you, you'll probably create them as you go. But then once they're there, it's...

MARK

20:42 Yeah, I gotcha.

CHRIS

20:44 Right. It's a one and done. And, you know, the next thing I'll do is I'll kind of run over to that's. Probably a good segue. Oops, sorry, what I will show you is what we call service opportunities, right? Because we have the concept of these recurrent services that you'll build out in service trade. So, all of your quarterly semi annual... annual PMS, right? Then we can go ahead and run a report, show me all my recurring services this month, right? And what this is doing will scour through every single location page and it probably pick two bigger parameters, but... every location page inside of service trade that you have one of those recurring services setup.

MARK

21:23 Gotcha.

CHRIS

21:24 Right. And then what this will do and this will kind of show you some of the scheduling aspect of what service trade is all about. So just give this a second to load. It's. Me, turn my video off. Sometimes that bogs down my internet.

--- Recurring maintenance ends ---

MARK

21:38 Yeah, no, I understand. So... that is a broad search.

CHRIS

21:44 Yeah. Hi, Laura, and I live out... eastern shore. My, on my internet is slow.

MARK

21:50 Yeah, everything's slow out that way.

CHRIS

21:56 I'm in like cleans town.

MARK

21:58 Okay. Okay. Not to be brother in law is from out that way, but for the life of me, I can't remember what time he told me. My wife told me it was just, you got off of 50, and then it was far like another 20 Miles. So I don't know exactly.

CHRIS

22:20 Yeah, that's probably a hike, you know, where the outlets are on fifth.

MARK

22:25 Yeah, yeah.

CHRIS

22:26 I'm right?

MARK

22:26 There. Okay. Yeah. Right there's a golf course. They're kind of on the back side. Yeah.

--- Recurring maintenance ---

CHRIS

22:31 Yeah. Yup. Queenstown, yeah.

MARK

22:34 Yep. I gotcha. All right. Where you're at?

CHRIS

22:38 Yep. So hey, I got, you can see the list of jobs that we have here, right? And this is just our scheduling of these recurring services. I'm gonna jump into to more of the dispatch inside here in a second, but, you know what I wanted? As I scroll down, I can kinda see some quick overview. I got a semi annual maintenance, this rooftop unit... right here. We got a spring startup on this mini split. We gotta go evaluate the systems for the building... down here at the marriott. We got three different services to complete, right? So I'm just kinda give you a quick overview, 250 bucks expected two hours and we got inspect this generate, right? The next thing I'm gonna do is I'm going to scroll up here. Let's call this the PMS and I'm going to go ahead and essentially turn these what we call services into actual jobs... and that's essentially gonna throw them up on the map.

--- *Recurring maintenance ends* ---

CHRIS

23:31 And there's a couple of ways we can capture that. But what I want to show you is kind of how that looks on the map. Again, you can filter this out how you need to. So depending on how you guys wanna manage the data inside of service trade, you can as I continue to scroll down, mind you, this is a demo account. So you wouldn't have all of this stuff in here.

MARK

23:48 Yeah.

CHRIS

23:50 But as I scroll down, you can also see, hey show me all the different job types that we have here. Show me... show me jobs a 1,000 dollars and higher, right? So beginning of the month, let's get the cash flow role and let's... let's get all our big PMS out of the way. We'd go ahead and filter this and this will throw all these things up on the map.

CHRIS

24:11 Let's just go find out to... Michigan or something, Michigan, right? So you can see the... the bubbles are color coded by the technician, right? And you can see all of this will be drag and drop. So I can come in over here and say, hey, Eric, grab this job in Detroit, right? You can see now, he's green. And so, since he's taking that other job up here, we can kind of say, hey, you can get there Tuesday.

MARK

24:41 Gotcha.

CHRIS

24:43 And then we can also say, hey, this is a... you know, a two day appointment, right? We know that's going to be two day PM. We can also drag and drop different technicians on there, right? So, hey, now, you can see we got two technicians on a two day appointment. So multiple technicians on a multiple day... set point.

MARK

25:07 Huh.

CHRIS

25:08 Any questions on... on the scheduling aspect?

MARK

25:13 No, I don't think so. So that's your... your weeks down below there?

CHRIS

25:18 Yeah.

MARK

25:19 Is there like on assign jobs or... or like a list of jobs somewhere that you can look at?

CHRIS

25:26 Yeah. So if I come over to what we call the dispatch board right here's, all of my available jobs that we have.

MARK

25:35 Okay.

CHRIS

25:36 Right. So, hey, looks like here's the list of PMS, and again, you can filter this out how you need to see this, right? So only show me.

MARK

25:44 Yes, you can do different categories that can cause delays, those categories and it looks like he can.

CHRIS

25:51 Yeah, I like to customize as a strong word in the SaaS, space. Yeah, ural, yeah, let me do that, right? Hey, I don't need to see sales calls survey or upgrade call so we can turn those off.

--- Type of work ---

MARK

26:03 I gotcha.

CHRIS

26:06 So, I, and the point there is... is typically kind of what happens is if we make an update, it's pretty much platform wide.

MARK

26:12 I gotcha.

CHRIS

26:13 That's that's why we're focused strictly on commercial service contractor. So whatever makes sense for you probably will make sense for our other customers though. So.

--- Type of work ends ---

MARK

26:21 Yeah.

CHRIS

26:21 Right. That's why you'll see updates every two weeks from... from service trade on desktop like that.

MARK

26:28 Yep. I gotcha.

CHRIS

26:30 And then this is all drag and drop to, right? So I can see, hey, Darren Scott, nothing today. I can go ahead and grab this Angus barn and drag and drop that down to his schedule if I need to.

MARK

26:40 Okay.

CHRIS

26:42 Hey, we can also go do this gallery at Tyson's it looks like that's an inspection so I can drag and drop that down there for him. And again, we'll track all of that stuff that you need to see if we can filter it by office too, right? So, hey, only show me stuff for jays office.

CHRIS

27:01 The next thing, this is also kind of where we can go ahead and... you know, service call is coming up, right? So, hey... you could say Arthur ashes calling us... to pick whatever I'll pick this Butler place, but there's calling us. They're saying this an emergency service call. We... we got a response time for Butler that we'd get to them, you know, within four hours, whatever it needs to be. I'll just say.

MARK

27:30 Yep.

CHRIS

27:32 Hi, Christie. Well, handles all of butler's calls. I can put him right here, but if not, I can just say, hey, no, he... will know all the... the pieces of equipment out of that specific location.

--- Assets ---

CHRIS

27:43 Yep, right? So I can just say, hey, we can put that on the panel for whatever reason. But no, he's going fix, not to exceed... seven and 50 bucks or something... right? What that will do is that will then go ahead and drop down into an unassigned bucket.

--- Assets ends ---

CHRIS

28:02 I don't know which opposite it's associated with that one... right? So, it's associated with the cooling office, but it's dropped down into this unassigned bucket. And then again, this is all drag and drop to, so you can kind of see what would make sense. So like, hey, I can go ahead and give that the tenth because he's got nothing to do today.

MARK

28:18 Gotcha.

CHRIS

28:22 That's trying to, despite the scheduling a dispatching?

MARK

28:25 Yeah.

CHRIS

28:27 Questions on a, on that.

MARK

28:30 Now, now, with the not to exceed 750, that was just a note, right? That's correct on the job?

CHRIS

28:37 That's right? Can...

MARK

28:38 Can you put like expected hours on it or something like that?

--- Tech time tracking ---

MARK

28:42 And I mean, I'm probably communicate that directly with the guy doing it anyways, but it's just, I know that was something we used a lot of print them out. You know, the guys would know if, you know, they had a job for that day and they only have four hours on it, they knew that they would need to call in, you know, around nine, 10 o'clock to figure out where their second job was going to be.

CHRIS

29:08 Yeah. So, a couple of things there, this job is... is slated to be one hour long.

MARK

29:12 Yep.

CHRIS

29:13 Could go ahead and say, hey, you know what? Now? This is a three hour good?

MARK

29:17 Yep.

CHRIS

29:17 Right. So, they'll... they'll see now that that's supposed to be three hours long.

MARK

29:21 That's...

--- Dispatch ---

CHRIS

29:22 The other thing that we can do is not released the appointment, so you can build out some... some schedules for the technicians and then not released that. And then as they're complete, you can just go ahead and release it and it will automatically update into the app that it's there.

MARK

29:38 That's so they won't necessarily see that it's there until you hit that.

CHRIS

29:42 Correct.

MARK

29:44 That's that's actually, I never would have thought that would have been an issue, but that's actually very useful because I would have technicians read way more into stuff that we would throw on the board because as soon as we would throw it on there, they would see it.

--- Dispatch ends ---

MARK

30:01 And then all of a sudden they're having a connection when reality was we were just placing it somewhere, you know, to be reassigned. And, you know, I would have guys call me about what is this? On Friday? I gotta go over to columbia. I don't live anywhere near that. Look man. One. It's three days out into it's. Probably not gonna.

--- Dispatch ---

CHRIS

30:23 Guarantee you.

MARK

30:23 It's just there. I mean, I've... I've learned over the last couple of years have let's see some of my technicians can be.

CHRIS

30:33 Yup. So, you know, hey, this, can we have that signed bucket to. So as you're moving things around, right? That can live in the unassigned bucket. But to your point, yup, we can build out a technician schedule and not release anything because.

--- Dispatch ends ---

MARK

30:46 Yeah.

CHRIS

30:47 Yeah. I gotta send them downtown DC at one o'clock on Friday afternoon. I don't want him to know that until.

MARK

30:52 Yeah, yeah, exactly. Yeah, because that's the other thing, I mean, I like to be as positive as the next guy, but, you know, when you... when you let somebody know that that's going to be happening all of a sudden, their first job is gonna find a way that it's gonna take longer.

CHRIS

31:13 Yup. Your percent?

MARK

31:17 No, that's... that's good. I mean, you know, I try to be very transparent with everybody, but just have experience working with... with, you know, my... my colleagues first hand and now, would it can lead to?

CHRIS

31:32 That's why it's there. Yep. Yep. If you can also see it's a little small.

--- Tech On-site ---

CHRIS

31:37 I can Zoom in a little bit, but, you know, hey, this blue tech underneath is the... the technician clocking in and I'll show you what that's gonna look like here in a second. And whether that be an in route or he's actually on site then as soon as he's done, there will be another little uptick right here that says he's done in that job has been complete. So, you'll have there as to, you know, technicians clocking in and out. So... when that job is done, right?

--- Dispatch ---

MARK

32:05 Yeah, no, that's good to know.

CHRIS

32:07 I can see he's done the Butler job. I can then go ahead and release this comcast center. So.

MARK

32:14 Yeah.

CHRIS

32:16 Cool. Any other questions on the scheduling dispatch?

MARK

32:22 No, I don't... I don't think so. Okay. It's all, you know, again, very... very useful stuff.

--- Dispatch ends ---

MARK

32:28 I know starting out, I'm not gonna be using a fraction of those capabilities, but the goal is to... to get to there. So, no, that's great. Yeah.

CHRIS

32:38 And I'm just trying to keep it kind of high level, right? Yep. I know some stuff may not pertain to you right this second, but certainly probably will in the foreseeable hopefully.

MARK

32:48 Yeah, yeah, definitely... definitely.

CHRIS

32:51 It's kinda rewind a little bit to show you this war quarter, right? I figure we can jump out in the field now and show you what that looks like. Let me try to get my quick time. Hang on a second. Here we go. Alright.

--- Dispatch ---

CHRIS

33:09 So you can see... see my phone, right? So again, some... some features here that may or may not pertain to you, but hey, here's the list of all of the jobs, right? Obviously, if they're not going to release them, they would be turned off. But if you do, the technician can see that.

MARK

33:25 Yeah.

CHRIS

33:26 We can also give them unscheduled jobs, right? So if you allow some of the technicians to go build out some of their own schedules and routes and let them do their own thing, they can go ahead and see that as well. And then any completed jobs too, right? So, hey, I can come back here and see all of my past completed jobs and... and what I did last week, we'll also have all the jobs up on a map to, right? So, hey, I can see... you know, now you can see where I live, but yeah, here's all the other jobs, right? Blah, blah blah, I can certainly get some of that visibility.

--- Tech On-site ---

MARK

33:58 Yep.

CHRIS

33:59 Let's go ahead and filter this by today. Here's. This camden yards right down here at the bottom will have those three o'clock features, right? So, hey, job prep, I'm clocking in route, right? I can go ahead and also notify you so you can kind of see what that looks like.

--- Tech time tracking ---

CHRIS

34:15 Hey, I'll be there 10 36, clock in like I'm driving on site... quick drag today. And now we're actually on site.

MARK

34:29 Okay. That's kinda cool. So, Kim breakout travel time as well as actual onsite time that's kind of useful.

CHRIS

34:37 Yeah. So, you know, for some costing purposes in the back end, you kinda wanna track, you know, hey, why is Chris driving for 20 hours a week? And everybody else has got five or whatever that is, right?

--- Tech time tracking ends ---

MARK

34:48 Yeah. Yeah. No, that's... that's good. And I mean let's face it. This is, you know, the DC area. There's times where it may take us an hour to get form off down the street here. Now, it's just the nature of the beast.

CHRIS

35:07 Yeah. So we're out here. We can see that this is a P preventative maintenance.

--- Recurring maintenance ---

CHRIS

35:11 I said I was at the preventative maintenance, but, you know, if this was a service call, emergency service call inspection, whatever that would be. So down here is where we're going to kind of get our dirt digital work. Quarter services is the first time that I clicked on here's.

--- Assets ---

CHRIS

35:25 What I... I have two things to do here, right? I just associated the service with the building, but we could put that onto a piece of equipment. And as I scroll down, you can see the second one is on this roof top, Adidas northeast, right? And then this is just the big text box of all the verbiage that you want the technician to do, right? So whatever your verbiage is, check this, check that. What pressures this type stuff?

MARK

35:50 Yeah.

CHRIS

35:52 Comments, right? If you remember, I put that, bring a 20 foot latter comment on here. I can get off from the text side. I can also go head and say customers. Happy, I'm all set here and finish.

MARK

36:06 Gotcha.

CHRIS

36:07 So we can do talk to text there attachments. This is kinda where we can start to build out some of... what's the right word. I'm looking for this. The social media aspect of things right here's me whether it be a service call. This is the before and after this is we changing out the filters, whatever we need to show the customer, right? They're probably not going up on the rooftop with you guys.

--- Tech On-site ---

MARK

36:30 Yeah.

CHRIS

36:32 Right? It's just kind of getting the conversation about the work you're doing versus an actual invoice. So, hey here's contacts that's pretty self explanatory job items. These are the items that automatically flow to this work order because it's a recurring service. But, you know, hey, let's just pretend like it was a service call and I gotta add some labor here.

--- Assets ---

CHRIS

36:56 Okay? And we'll just click some air solutions later. Let's say we got four here. I'm gonna associated with a specific service, right? So this means I'm essentially tying these labor items to a piece of equipment, right? So I can go ahead and grab that first HPC we got for our, is there, we can also source this to a specific technician, for example... right?

--- Dispatch ---

CHRIS

37:20 So because we know Chris is rate is different than Billy's the versus Tim's... and then we can go ahead and add that. You can come in here. You know, how to use a filter. Okay? I'm gonna associated again, I had to put a new filter onto this, the... the

Adidas rooftop unit for some reason our cost as an in here or maybe it was supposed to be easier because we don't want to show the technicians that cost... again.

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

CHRIS

37:48 I'm going to sources to, from a warehouse, right? And I pulled it off my truck.

MARK

37:54 Okay. So that's got like an inventory keeping aspect to it for the trucks?

CHRIS

37:59 Yeah. So there's two things there. We have a full inventory management system. This is more of just a sourcing it. So at the end of the week, I can run a report of show me all stuff that came off of truck one dump, that into a spreadsheet here's. The 50 items that we use them. We can kinda do an inventory count.

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

MARK

38:18 I gotcha.

CHRIS

38:19 And make sure... make sure it's all right?

MARK

38:22 No, I gotcha... I gotcha.

CHRIS

38:24 So I can go ahead and say, hey, you know, let's go ahead and grab like a pump or something. Alright? So, you know, hey, we had to go grab this circulating palm. And I can also say, hey, we got this from a parks vendor.

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

MARK

38:38 Okay. Cool. So you can actually select items you purchase that... that would be something we would use more often because we... we don't typically carry a lot of truck stock.

CHRIS

38:48 Yep. Good... good... good for you guys, right? That's for August and shop make first make Ferguson.

MARK

38:55 Hello? This, yeah.

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

MARK

38:56 And I mean, you know, unless... unless I'm working for train or your carrier, I mean, I... I need a semi, you know, there's just not enough parts in the world that, I mean, there's some random things like maybe a contact or, you know, some, maybe a fan motor, but even that's a stretch.

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

MARK

39:16 But contactors thermostats realize very generic, you know, can be used on any type of unit that's pretty much the only things we would keep our trucks.

CHRIS

39:26 Okay. Yeah. So we can source those to, you know, the... the wholesaler, yeah, who's your biggest customer? Erica?

MARK

39:37 Yeah, probably on average, Erica.

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

CHRIS

39:40 Okay, cool. We're also gonna status these parts too, right? So not yet ordered... ordered and received. So I could say this has been ordered and I can expect my delivery date to be, you know, on Friday.

MARK

39:55 Okay. Okay.

CHRIS

39:56 Right. So point they're being it was, I can't finish this job because I gotta go grab apart.

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

CHRIS

40:01 I order it. It's supposed to be here Friday and then in the back office will track that job and give you guys have the reporting functions to say, hey, where's with jobs that I have open, what jobs are... are parts pass do, right?

MARK

40:12 Yeah. No, that's... that's a big one that... that hit us kinda hard last year with COVID because, you know, vendor would give us a, you know, a seven day or 10 day lead and then all of a sudden a month in our customers call. And like, hey, where the heck is this? Because, you know, we didn't set an internal reminder. We just assume the vendor would call us when it arrived and COVID strikes all of a sudden, something that used to take a week's taken three months.

CHRIS

40:36 Yeah. Yeah. Yeah. So we'll track that information for you, right? So... and then give you guys parameters in inside of service trade for show me all my jobs with parts overdo here's.

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

CHRIS

40:49 The list of 50 jobs that parts are... are passed, do their delivery date, or should we now with parts that are... that are expected this week or next week, right? So that we can get those things on the... on the schedule for the text?

MARK

41:01 Yeah, no, that's great.

--- Assets ---

CHRIS

41:04 Next time we're going to go to his assets, right? So, hey, here here's the pieces of equipment out here at this specific location. I can see related or all assets, right? I can also click into this air compressor, right? And get some more information on this specific piece of equipment. Meaning I can get a full service history. Obviously nothing new location for me but all of the past jobs would be there and I could get all of those... those jobs.

MARK

41:32 Okay.

CHRIS

41:34 Maybe this one. Yeah. So there you go. That's kind of what it looks like. It looks like we did a PM back on April 20 third. I click that specific PM. And if the technician did what he was supposed to do, these pictures would be there, any deficiencies or job items that he used would all be there?

MARK

41:50 Gotcha.

CHRIS

41:52 Can also track the deficiencies on each piece of equipment, right? So here would be the list of all deficiencies. And we're going to go here in a second... and then attachments to, right? Hey, so this can be a picture of the rating plate... and say, hey here's, a picture of the rating plate that can be a wiring diagram, install manual tech manual, whatever needs to be with that piece of equipment.

MARK

42:15 Yeah, no, that's great.

CHRIS

42:17 Right. So, we'll... we'll do a really good job of all of the asset management out in the field. Technicians can also go ahead and add a piece of equipment to, right? So, hey, I got a new AC unit here. Just say it's in the basement. I'm not gonna go through all this, but you can kind of see we can do model serial number, belt count, quantity, filter size, the quantities.

MARK

42:37 Yeah. Now, let's see. Yeah, that's... that's really good. That was one of the major... major lacking things from our... our system. I paramount was it takes could not add something. It had to go through the office. So it basically never happened.

--- *Paper process* ---

CHRIS

42:55 Yeah, I'm sure. Yeah. And then you don't know what's out there?

MARK

42:58 Yeah. At one that's just and you're doing double the work, you know, text. It's just madness not, you know, not to complain about an old system but I would literally have better luck calling one of my guys and say, hey send me a picture, that name plate because they would have it on their phone but not in our system even though we've been there 10 times this year, you know?

--- *Deficiencies* ---

CHRIS

43:24 Yeah, that's craziness.

MARK

43:26 Hello, you know, user friendly at the app is... is very important.

CHRIS

43:30 Yeah. So cool. The next time I'm going to go to his deficiencies, right? And this is just kind of where I can come in and say, hey, we gotta broken compressor here, right? And this is just on a PM, but this could be a service call too, right? Yep, but

again, big on the pictures because we think that's really important, right? This is a, this is the blue carrier compressor.

MARK

43:53 Yup.

CHRIS

43:54 Okay. Go ahead and do one more real quick. Is that photo? Let's just go ahead and click add. I'll also go ahead and recording audio memo to, right? And this is going to be video too, but this is, hey mark, I'm gonna need to 20 foot ladders. I'm gonna need a helper. I need special part abc XYZ and this thing's gonna take me every bit of eight hours... but I'll just go ahead and click save, notice these red triangles again, you saw how slow my internet is. So the point?

--- Assets ---

MARK

44:24 Yeah.

CHRIS

44:25 Everything you've seen so far will cash in the app. So you don't have to have a signal to do anything we've done so far.

MARK

44:33 Gotcha.

CHRIS

44:34 We'll call this an operable. Again, I'm gonna put it on that piece of equipment, right? Because I want to track those deficiencies on the equipment level called on the cooling service line.

--- Deficiencies ---

CHRIS

44:45 And then the status of this deficiency too, right? So, hey, if it was a quick 10 dollar fix and I... I just fix it, I still want to note it because you want to tell that story to the customer.

MARK

44:53 Yeah.

CHRIS

44:54 But I'll go ahead and click save. Somebody from the office will get an email notification to that deficiencies just been reported.

--- Assets ---

MARK

45:02 Gotcha.

CHRIS

45:04 So, next thing I'll do is click view more details down here. At the bottom, this is just a more granular view of what the technicians we'll see, right? So, hey, here we are here's, some items that we use. I'm not gonna go through all this, right? But again, all of these blue arrows are hyperlinks to more information regarding that specific data set point.

--- Forms ---

CHRIS

45:24 You can see our deficiency hasn't posted yet because we haven't called a signal yet, but what I wanna do is go ahead and get to the paperwork, right? And this is where I'm going to go ahead and download my blank paperwork. So I'll go ahead and do the refrigerant tracking.

CHRIS

45:43 And then this is going to be your guys forums, right? That we will pre-fill then we can bring over some of the data points out of service trade being date specific time. The work order per technician has EPA whatever you guys want on your forums. And then the technician will come through here and start checking all these boxes.

--- Assets ---

CHRIS

46:04 Yes, no, yes, yes, pass fail. If I got to add any comments, I certainly can do that, right? And the, he can keep going down. You can see this is a two page document, right? So page to, we're going to do the rooftop unit, right? So we can bring over that model and serial number and again, blah, blah, blah technician, we can go ahead and say, yeah, this pass this fail data out of that.

--- Assets ends ---

CHRIS

46:27 And then he'll just go ahead and click that arrow on the top, right? And then just go ahead and click back to add to service trade... and we're going to upload that back into service trade. So that will beat now beyond that specific work order inside of service.

--- Forms ---

MARK

46:42 That's cool. What... what type of document was that... was that like HTML or PDF?

CHRIS

46:48 PDF file?

MARK

46:50 That's great.

CHRIS

46:52 Yeah. So that again, they would be your guys PDF that we help you turn into a digital format to... to kind of go in and fill out.

MARK

47:00 Yeah, no, that's... that's great.

--- *Forms ends* ---

MARK

47:02 That's something that's... that's something we had a hard time with before is, you know, we had to basically pay the last company to take a form and then create it as an HTML file. So you lost a lot of the PDF functions from it. So that was, we just didn't do it. You know, it was... it was too much. We never implemented.

CHRIS

47:25 Yep. Okay. Yeah. So that's kind of how that works with service trade, right? And, you know, we want to empower you guys so that you guys can do them yourselves. That being said, you're running a service business and running a 1,000,000 Miles an hour if you gotta do form and it's like, hey, Chris just put this in the service trade for us.

--- *Pricing* ---

MARK

47:43 Yeah.

CHRIS

47:44 That is a billable service, but we certainly can do it. I think it's like 150 dollars a page. So it's not outrageous.

MARK

47:50 Yeah. Yeah. That's not bad.

CHRIS

47:52 You know, and that's kind of one of those things. Hey want to empower you. We don't really want to do it.

--- Pricing ends ---

CHRIS

47:56 But if, you... you know, we got keyboard workers that are really good at it and probably can do it a little bit faster, right? Just with.

MARK

48:02 Yeah. Yeah. Well, and that's... that's just that I'll be looking, you know, I don't want to outsource everything but anything that's conveniently able to be done then that's kinda my goal.

CHRIS

48:13 Yeah. And so, you know, hey, that's again, that ball's in your court. You want to do it yourself and source that great. We're all happy all, you know, all happy for you and we're even help you train you on that. If you want, just want us to do it. Great. We'll do it.

--- Tech On-site ---

MARK

48:26 Yeah, he could do.

CHRIS

48:29 Next step here is I'm going to go ahead and capture my signature from the field Mary and create my work acknowledgement again here's, the services that we were out, they're supposed to do, I could click on that and see what we were supposed to do.

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

CHRIS

48:42 I won't go through all that, but you can see the deficiencies comments. And then we're just gonna go ahead and review this, right? If the customer needs to... to put a po number in there or whatever he can and I'm going to send, you are having the knowledge confirm and sign. I should have put my name in here, but I didn't...

--- Tech On-site ---

CHRIS

49:06 And I'll forward this along to you Chris.

MARK

49:08 Yeah.

CHRIS

49:09 Alright, service trade dotcom. So you can see what that looks like.

MARK

49:13 Yeah.

CHRIS

49:14 Just click next and then, hey, here's my signature.

MARK

49:17 Nope.

CHRIS

49:18 We're complete. And then the technician is essentially done. So, hey, I'm done here. I'm gonna go ahead and clock out. You can see our work acknowledgement already came through.

MARK

49:32 That's great.

CHRIS

49:34 Right. This is where mark off all my completed services. Yes, I got both of these done if, for whatever reason, I didn't get this one done. I can leave it open right now. You have visibility, right? Hey, I had to go grab some parts. They didn't have it in stock so that'll stay open.

--- Dispatch ---

CHRIS

49:48 And then I might done with this visit, right? So I could click, no, meaning it would stay back in my queue or I can click, yes. So, even if the service wasn't complete off of my to do list so we can go over to the next technician or we can schedule what makes sense. But yeah, some configurability, they're an options from the technician standpoint, right? Hey, I'm essentially done. I'm going to grab my next job at the Angus barn on click and direction... normal model.

MARK

50:18 Very cool.

CHRIS

50:21 That's kind of the... the mobile app. Any other questions on that?

MARK

50:26 No, I don't think so.

--- Tech On-site ---

MARK

50:28 Would they like say, you know, that was your next job? Would... would they go ahead and hit clock in at that point? Because, you know, our guys are pretty much on the clock until they're done for the day... okay?

CHRIS

50:42 Depends on how you want to do that most folks do in... in route... right?

--- Tech time tracking ---

CHRIS

50:48 And then we can just accumulate all of their time whether it be travel or actually on site.

MARK

50:53 I gotcha.

CHRIS

50:54 Doesn't matter for the service trade side. You still need it for the payroll side and the backup?

MARK

50:59 Yeah, that's... that's what I was kinda getting that is, you know, I still wanna, I almost like that you can kind of track it. You know, very closely how much time they spend on site versus on the road, you know, from... from payroll. It doesn't matter. We're paying them for their day regardless, but, you know, that's... that's kind of a powerful tool overtime to kinda see, you know, what... what makes sense for... for this particular job.

--- Tech On-site ---

MARK

51:25 I mean, are these guys consistently not gonna miss out under two hours or under three or four or whatever the case may be? So, no, that's... that's very neat.

CHRIS

51:36 Yeah, cool. So, so kind of moving back into the office, right? We're... we're still at this camden yards right here's. Our Bill to, this is our specific location. You can see technician said he's completed here. We're in the workflow service trade. We're

technically still in progress, right? Because somebody from the office needs to... to review that work order from the technician to say, hey, yes, all that's right?

--- Assets ---

CHRIS

51:58 Or to the, you know, the point is... is, hey, we can scroll down here. It looks like we have some parts that the technician added out in the field. I don't know like Chris didn't associate this with a specific piece of equipment. So we can go ahead and fix that. Right? There should have been source to that a rooftop.

--- ST app contracts and pricing ---

MARK

52:16 Unit. Yeah, I gotcha.

CHRIS

52:19 Right. So we can track all the stuff that we're using against each piece of equipment for whatever reason, Chris change this air filter cost. I don't know why he did that standard costs seven, 250 dollars.

MARK

52:30 Yeah.

CHRIS

52:31 So, we'll kinda flag that information.

--- Tech On-site ---

CHRIS

52:35 So that looks right as I continue to scroll down here's, our clock events right to your point earlier. I can see that I got a, you know, however much drive time that I have here and then however much time on site. So we'll know that information for you for that specific, you know, whether it be a service call, PM, inspection, whatever that needs to be.

--- Assets ---

CHRIS

52:56 Again, here are the two pieces of equipment that I'm the technician was out there to work on, right? So 10 chiller units, all that would be there. So I continue to scroll down. Hey, here's this deficiency that the technician found... and are you gonna want to quote out service trade?

--- Assets ends ---

MARK

53:16 That's kinda thinking maybe, but I'm not sure. Maybe not right off the bat, but it kinda depends, you know, there's a lot of influx of kind of starting... starting from scratch here. So depending on the amount of work I get and how quickly on board more guys than quite possibly, I want to add it, you know, in the future... you know, it... it seems like a very user friendly app. So I don't know maybe it'll be beneficial added at the beginning. I'm not sure.

CHRIS

53:49 I would challenge you to added at the beginning. And the point they're being is... is watch how fast I can kinda get a, you know, quote out, right? And.

--- *Quote templates* ---

MARK

53:56 Hey.

CHRIS

53:57 We'll bring your templates into, right? And if you don't have templates, you can build them out. I'm sure you probably know some stuff off the top of your head, right? But yeah, this descriptions are going to be all your verbiage, right? And here's the items typically come with this quote template, right? So again, all that would be your verbiage. So every time we saw a template up here here's, what we're gonna do, blah blah... blah blah blah here's. Our warranty, all the items. And if you remember, Chris said we got eight hours, not three and we need some sort of special blue part, no special blue compressor part or something, you know, not an.

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

MARK

54:33 Yep.

CHRIS

54:36 Go ahead and associate that with the HPC service line... right? We can say, hey, this thing cost us 2000 bucks. I'm gonna charge of this guy 3,000 bucks... so we can dictate how we want to show this to the customer as well as our contract pricing rule, right? So hey, if I change this, you can see my market rules changed.

MARK

55:00 Yeah.

CHRIS

55:01 As you start to build out service trade, you know, I would challenge you guys to sell a preventative maintenance program, a gold silver, bronze level PM program, right? You're on our gold level PM. So your... your labor markets or less... whatever

that needs to be. And as I scroll down, you can also see the pictures and here's the audio of... of... whatever we needed to fix.

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

CHRIS

55:24 The next thing I can do is kind of send this to you, right? Mark. Do you have access to your email?

MARK

55:30 Yeah.

CHRIS

55:33 So, I'll send that to you... you may have to refresh your inbox real quick.

MARK

55:37 Okay.

CHRIS

55:39 You should see that in your inbox.

MARK

55:43 Yeah.

CHRIS

55:46 Open that up and then scroll down to the bottom. It'll say view and respond the quote, right? And you're just kinda getting the... the customer experience right now, right? This is what your customers will go through.

MARK

55:58 Okay. Yeah, that's wow. Yeah, that's nice. Yeah.

CHRIS

56:06 Yeah. So you can go ahead... go ahead and approve that quote.

--- Quoting ---

CHRIS

56:17 And then let me know when you're back on my screen.

MARK

56:25 Okay.

CHRIS

56:28 So, you can see now, this has changed to approved. We'll also track a full history of this quote.

MARK

56:35 Yeah.

CHRIS

56:36 So, hey, I can see whoever it is that was adding these pictures... right? And then I can see that you've viewed that quote from this IP address. Then you'll have that quote from this IP address?

MARK

56:47 Yeah.

CHRIS

56:50 Right. So we'll check a full history from, and then from there, we can go ahead and create a new job from a quote or add that to an existing job.

MARK

56:58 Yeah, that's... that's really neat. I think a lot of people would appreciate that. That's one of the comments I've gotten and... and, you know, meeting with some of my previous customers, does that, you know, they've... they've met with other contractors send that, you know, at my last company, our... our quote system was... was dated to put it delicately.

--- Quoting ends ---

MARK

57:20 You know, it just, there was a lot of stuff that was copied and pasted and, you know, sort of assembled from bits and pieces of... of other contracts. And at the end of the day, it's a PDF that, you know, sometimes they needed to sign, sometimes email was adequate, but, you know, something like this, you can kinda click right on it and have, you know, an easily tracked verifiable approval.

CHRIS

57:46 Yeah. And it's dynamic to, right? And it's just, it's in my opinion, it's a better customer.

MARK

57:52 Yeah. Yeah. Well, like you said, it's all... it's all online. It's you know, it's what everybody's kinda used to. There's a younger generation of building managers and property managers that are out there and used to this type of thing. You know, it's... it's not about, you know, next day airing a physical contract over to get, you know,

approved by the correct person and sending it back so we can start the work. Yeah. Yeah.

--- Quoting ---

CHRIS

58:18 Right. So, yeah, absolutely, right. And hey, the other thing that we do really well at is here's our quotes page?

MARK

58:26 Huh.

CHRIS

58:27 To let you run reports on, show me all quotes that have, that we created for the first of the year, right?

MARK

58:33 Yeah, show.

CHRIS

58:34 Me all quotes that customer has submitted it and viewed but not approved, right? So, this is everything that... that the customer has opened up, looked at but chosen to ignore it. We can also then box and those back out to the customer, right? So emails get bogged down, we can go ahead and take that right back to the top of their inbox, help improve that quote approval process, right?

--- Pricing ---

MARK

58:55 Yeah, yeah. Yeah. No, that's... that's great.

CHRIS

59:00 Also run reports for, you know, hey, you know, customer, hey, here's, your specific location here's. We... we got 100,000 dollars in quotes out for you guys for 20 20. You better put this in the budget for 20 21.

--- Deficiencies ---

MARK

59:12 Yeah.

CHRIS

59:14 Same concept with deficiencies too, right? So we can track all of the deficiencies that are being reported in the current status. So again, you know, hey, government

agency, and we got, we had 100 deficiencies out here. You guys should probably budget fixing that chiller next year.

--- *Deficiencies ends* ---

MARK

59:28 Yeah.

CHRIS

59:29 Right. So, so we can start to squeeze them for... for everything that you guys can, right?

MARK

59:35 Yeah. No, that's... that's great. Because that's something we've been asked in the past is, you know, well, how much money that I spent working on that piece of it, you know, that rooftop?

--- *Pricing* ---

MARK

59:43 What did that rooftop cost me last year? You know, what's it gonna cost me this coming year? And how much is a new one? Yeah, that's... that's a very common line of questioning, especially from people that do cap X budget?

CHRIS

59:56 100 percent. Absolutely. Yeah, right. So, we went and we want to give you all of that data to empower you guys with that.

--- *Pricing ends* ---

CHRIS

1:00:02 So that, right? Again, the revenue generator side of things, right? So, yeah, government agency. Hey, you guys need, you need to plan out for 100 K for the swap out, right?

MARK

1:00:14 Yeah.

CHRIS

1:00:15 Anyways, the other thing I wanted to show you real quick is our job search functionality, right?

--- *Dispatch* ---

CHRIS

1:00:20 So again, we can run a report of job by location, jobs, by company... jobs, the parts saying, so you can see what the office side looks like. Hey, show me all the jobs with parts of overdue for delivery right here's. The list of all of the jobs that we got parts that are overdue, right? So we can make taking care of.

--- Tech On-site ---

MARK

1:00:42 Yup.

CHRIS

1:00:44 Rewind a little bit. We got distracted. But as I continue to scroll down on this work order, right? We're back at the camden yards, we still need to finish this thing. You can see my paperwork is here, whether that be the inspection or the PM here's, the pictures of the technician doing everything he's supposed to do. And here's a copy of the work acknowledgement, right? The customer signature?

MARK

1:01:04 Yeah.

CHRIS

1:01:05 What I wanna do is go ahead and complete this job. Two things can happen here. I can go ahead and immediately create the invoice, but I'm just gonna go ahead and complete this. I'm going to send the service linked to you... so you can kind of see what that looks like... right?

--- Tech On-site ends ---

CHRIS

1:01:19 So you'll have that, you can open that up at your... your leadership. With the next thing I wanna do is go ahead and invoice the job here's. All of these items. We're going to create this invoice from again, whether it be a PM service, call it emergency service, call inspection. It doesn't matter. We'll also get to this point here where, hey here's all the stuff that we used. Our margins are bad because I was screw around with the costing showing you kind of what that looks like. But the next thing, hey, we can always edit this to if we need to, for whatever reason, right? I can say, hey, it should be 600 bucks, not... not 100, whatever that needs to be, right to make our margins, right? If we had to. But the cool thing here and I don't think you've seen this yet is we can go ahead and send what we call the invoice link, right?

--- Quote templates ---

CHRIS

1:02:07 Again, you can choose how you want to show this to the customer, whether you line item, it group it by the different types of items or just strictly a grand total, right? So, for the, yeah.

MARK

1:02:15 Yep.

CHRIS

1:02:16 Same way as the quote, I go ahead and send this invoice.

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

CHRIS

1:02:18 Like I'll just pull up a full screen preview so your customers would get a very similar email to that quote, says, hey view this invoice and we'll track a full history the invoice to, but, blah, blah, blah here's, all the stuff that we used. This link goes directly to the service link. Oops, right? So there's no issue or question as to what that invoice is tied to, right?

--- Tech On-site ---

MARK

1:02:41 Yeah.

CHRIS

1:02:42 So, I can click that this invoices for that PM that Chris Kidd well did here's, his inspection paperwork, or install paperwork, whatever that needs to be. I can also click right here and see that Chris kit well signed off on it. So I know who was on site and here's that deficiency too, right?

--- Invoicing ---

MARK

1:03:00 Yeah.

CHRIS

1:03:00 So, you'll have that service link in your inbox in a second, and then your customers thing can go ahead and pay now and go ahead and pay with a credit card, pay with AC.

MARK

1:03:09 That's very cool.

CHRIS

1:03:13 So, kinda... kinda was moving fast there at the end because we are running out of time. We went over by about two minutes. I'm sorry.

--- Invoicing ends ---

MARK

1:03:18 No, no problem. No, I appreciate you going through everything with me.

CHRIS

1:03:23 Kind of a service trade back in a nutshell, you know, 30,000 feet. I'm hoping to spend a lot of memories.

MARK

1:03:29 Yeah, no, I... I, the... the one thing that stuck with me as I thought you guys had an awesome platform and I still think that, you know, it... it looks great.

--- Pricing ---

MARK

1:03:42 I guess ultimately Di, do you guys do like licensing like per... per user? Or how... how does pricing go? Yes?

CHRIS

1:03:53 So, the thing to note here, we can get you guys started off on select that 79 dollars a month per tech... right? So a minimum of five tax.

--- Pricing ends ---

CHRIS

1:04:05 The one thing I wanna make sure I note is, hey, the portal which we didn't even get to discuss. I can show you what that looks like. If you have a minute. Yeah. Okay, cool. I can pop that up so you can see what that looks like... right?

--- Customer engagement ---

CHRIS

1:04:21 Hey, aardvark is just our W site, right? So they go to take your guy's website... and we would have the portal here, right? And they would log in with their... their email address and I can kind of come in here and see, hey, what are today's? Jobs? Any upcoming jobs?

--- Customer engagement ends ---

CHRIS

1:04:38 And then any recently completed jobs too, right? So, hey, I can see frontier growth. I can then go ahead and click this. I'm just opening up in a new tab and it'll just bring me back to that service link, right? Hey, Billy Marshall is out there to do that inspection. If you had done his inspection paperwork like he's supposed to be there.

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

MARK

1:04:56 Yeah.

CHRIS

1:04:57 And then any, you know, deficiencies would be there, right? So customers can get all of that, right? We can also click the invoice. So I can come over here and see the invoice to, right? So the other cool thing here is customers can also pay now via the portal... right? So they don't have to ask for their email inbox. All that would be.

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

MARK

1:05:18 Here. Yes thing. You're straight to our website.

CHRIS

1:05:22 It's the website get with, right? As well as, hey, here's, all the locations I manage. So I can come here to the act me, right? So a specific location here's the act me that I manage. I'm in charge of the act.

--- Assets ---

CHRIS

1:05:35 Me here's all my deficiencies that I have right here. Now, pieces of equipment out at this acne location that I manage here's. A full service history of everything that's ever been done at this. Actually, you can see we go all the way back to 2013... so.

MARK

1:05:52 Yeah, that's yeah, that's... that's really... really cool.

--- Invoicing ---

MARK

1:05:56 I like that a lot. I, the one thing I don't have as much experience with on my end personally is, you know, actually sending out invoices and... and collecting money. So I'd have to kinda see, you know, how this would work with, you know, eventually which whichever customers agencies, whatever I end up working with, you know, how this works on their end and if they can, you know, like say from a government entity, if they can log in and use the same thing or five to send them a physical invoice or how any of that works?

--- Invoicing ends ---

CHRIS

1:06:32 I don't know that would be something.

MARK

1:06:35 Yeah, I'd have to kind of figure that out. But still, that's a really... really cool feature that, you know, even if it's not used, I know for a lot of people, they would really like that.

CHRIS

1:06:46 Yup. They can also request service too.

--- *Deficiencies* ---

CHRIS

1:06:49 So I can come in here and, hey, something's blown up at the act me, I can come back here and request service.

MARK

1:06:55 Yeah.

CHRIS

1:06:55 Right. You know, hey, the... the rooftop is making noises.

MARK

1:07:01 Yeah, that's... that's really cool.

CHRIS

1:07:03 And I can go ahead and request service and somebody from your office, we'll get that, you know, notified that.

--- *Pricing* ---

MARK

1:07:09 Yep.

CHRIS

1:07:10 Hey, acme... acme, rooftop units making noises.

MARK

1:07:13 Yeah. Yeah. That's very cool. Very... very cool.

CHRIS

1:07:19 So, you know, the select level 79 dollars a month per technician that we try to Bill annually. Yep. If you did need the portal, that would take you guys to 119 a month per technician.

MARK

1:07:31 I gotcha. Now, is there a minimum number of tests you gotta have?

CHRIS

1:07:38 Okay. Yeah, five technicians.

MARK

1:07:42 Okay. And then what's that, what's the last level on?

CHRIS

1:07:48 So, when you get over to enterprise, a couple of things there, multiple brands, you can split it out in the geographical regions... right?

--- Pricing ends ---

CHRIS

1:07:59 Scott, guardian, you probably know, them guarding fire request. So we... we put some stuff in here for geographical regions for them. Recurring invoices is a big one on the enterprise level. So, you know, the... the concept of being able to invoice without any services actually being performed. So, a lot of the alarm monitoring guys like this where just run a report on the first of the month and here's my 50 invoices that we need to go ahead and invoice the customers.

MARK

1:08:29 Yeah, no, I gotcha.

CHRIS

1:08:31 Hi, is this analytic reporting, right? So that's we use Amazon business information tool, so quick site, right? Which we have all the data and we just mind the data then put it in a bunch of graphs and pie charts and stuff like that.

MARK

1:08:46 No, I gotcha.

CHRIS

1:08:47 Revenue by location type stuff.

MARK

1:08:49 I gotcha... I gotcha. No, I mean, I think depending on the portal and where we're at, but I mean, that's... that's pretty awesome. I mean... for... for what we're

hitting more very expensive, I know the other place hasn't even got back to us on a price yet, which is weird because they were supposed to call us that evening with it. So I don't know where they're at, but yeah, and then...

--- Implementation and ongoing support ---

CHRIS

1:09:17 It would be some... some onboarding fees. They would be minimal because you guys don't have a lot of data.

MARK

1:09:22 Yeah.

CHRIS

1:09:22 Right. And the onboarding fees are more of a training aspect for you so that you can get that training done.

MARK

1:09:31 Yeah.

CHRIS

1:09:33 Right. So, because... because you don't have a lot of customers in locations right now. I mean, maybe you do have them in Quickbooks. I don't know.

--- Implementation and ongoing support ends ---

MARK

1:09:40 Yeah. I mean, that they're going to have some sites and locations based, you know, like I said, we... we do have a handful that they do own, am, work for and they do some construction stuff for. But as far as the... the type of work that I'm going to be, you know, gone on for myself. And with my division, it'll be pretty minimal. So... again, that's we... we kinda had a discussion with the owners of, you know, well, we'll get started with, you know, whatever we have. And then as once we need this, we'll... we'll... we'll move to something like this. But two days later, you know, I got an email back and now let's... let's get this lined up.

--- Pricing ---

MARK

1:10:20 Now, let's get it going. Now, we want to just started with... with one good system and we want to keep going that way.

CHRIS

1:10:27 Yeah. Okay. Yeah. So I mean, you'd probably be looking at 1,500 bucks just for that... that data migration, right?

CHRIS

1:10:35 Whatever data you do have. We'll put it in there. And then there's a lot of training that's involved with that too, right? Of.

MARK

1:10:40 Yeah.

CHRIS

1:10:41 Making sure you understand the platform with the... the goal there is for you to utilize it to... to the, its capabilities. Obviously, you'll have some start up processes, but... right. We wanna make sure you have an understanding of the platform.

--- Pricing ---

MARK

1:10:53 Yeah, no... that's... that's... that's great... that's great. And then, is it, is this for like a one year type deal or do we need to commit to a longer period of time or?

CHRIS

1:11:07 So up to you... right? We typically do annual subscription?

MARK

1:11:12 Yeah.

CHRIS

1:11:13 Right. That's probably 90 percent of our... our customers do.

--- Pricing ends ---

CHRIS

1:11:18 But again, that's the ball back in your court. We'd probably prefer an annual subscription. It's just easier.

MARK

1:11:24 Yeah, no, I think that's... that's certainly what we would... we would M for getting started... and I mean, it's you know, just given what I've had to spend on tools for a single truck. This is kind have a drop in the bucket to startup costs. So, you know, that's pretty encouraging for me. You know, I think this would be, this would be great. And... and, you know, the... the company itself, capital brand group is big on our... our image and marketing and... and our to parents, you know? So I think this kind of ties into that fully and I will, I'll be getting with us fan and max... max brand is the president and spend a story is kind of those... those two. I guess where are my bosses if... if you will. So I'll be... I'll be getting with them either later today or

tomorrow. I don't know if transaction coming into the office today, we kind of have like a hybrid type office work environment. Still some of busy here. Sometimes some of us aren't so definitely, I would say by Friday you'll hear from me because I know Thursday we have a meeting with kind of all hands going to be here. Okay? So Thursday afternoon, Friday, you'll definitely hear back from me and we'll kind of go from there.

CHRIS

1:12:47 Alright. That sounds good.

MARK

1:12:50 All right. Cool. Thanks. No. Thank you. Thank you. I really appreciate all your help, Chris. Yeah, I appreciate the quick turnaround on all this. You know, I just, I've had demos from a few other companies but yours... yours has been the one that's always stuck with me. So I really appreciate it.

CHRIS

1:13:10 Good. Well, hopefully we can continue working here in the very foreseeable future, so.

MARK

1:13:15 Yeah, yeah, absolutely... absolutely. Alright. Well, thanks again, Chris. I will be in touch.

CHRIS

1:13:21 All right. I'll talk to you soon. Bye bye, sir.

The End