ServiceTrade Demo with Suppression Systems, Inc.

Jonathan Middlemas with Suppression Systems, Inc.
Recorded on 10/11/23 via Zoom, 1 hour 23 min.

Participants

ServiceTrade

Jonathan Middlemas
Territory Manager

Jace Stephenson
SDR

Other

Zachary Tuck

Ryan Schwalb

Teresa Gravseth

Topics

Transcript

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JONATHAN

0:00 All right. Yeah. So just to kinda kick it off my name's Jonathan with service trade. Obviously, you know, pretty much the plan would just be for me to kinda learn a little bit more about your business. You know, maybe some challenges you're running into that you're looking to have solved through a software. Then after that, I'll give you like a background on service trade, what we, you know, aim to accomplish for our customers. And then we'll look at the product, some things that are going to be most important to you then like on the back end, if you think it's worth, you know, additional meeting, we can just get, that scheduled towards the end if that works?

RYAN

0:33 That works.

JONATHAN

0:34 Cool. Yeah. So before we get start, I just wanna kinda make sure I have everybody's role, right? You know, Ryan, if you don't mind what's yours, Zach, and tries role with the company?

RYAN

0:48 I do the admin side of the scheduling and paperwork as far as making sure the customers have their reports and putting it on whatever compliance engine or tigris.

RYAN

1:02 Okay. And then I do sales project management, following up on deficiency quotes... getting parts ready, you know, all the on hats. Gosh.

JONATHAN

1:16 Yeah. In.

ZACHARY

1:19 I'm gonna leave service deck.

JONATHAN

1:21 Awesome. Cool. So got a lot of different personas on the call which is always great. That way I can kinda speak to and hear different perspectives. It just kinda helps you all basically, get the most out of the meeting. So... you know, when we, before we jump into it, you know, Teresa, I know you spoke with Jason for a little bit. She left me some notes. So I'll just kinda tell you, what I know. And if you all could just, you know, fill in some gaps for me. We'll just start from there. But essentially, you know, you're doing installs, inspection services and maintenance work, running mostly off of like excel spreadsheets, some fill able PDFS and, you know, really, I guess the biggest excuse me hurdle that, you had mentioned to her was just overall like organizations. So is that pretty accurate? Or is there anything that, you know, I've missed up into this point.

RYAN

2:19 That's pretty accurate.

JONATHAN

2:21 All right. Yeah. So tell me a little bit, you know, organization, is something that'll you know, a lot of people kinda come to us with issues around what, you know, what specifically, are you all running into?

RYAN

2:34 I guess it's mostly the first off, getting the reports in a timely manner from the technicians is kind of one of our hurdles. And then once we do get them, making sure that like if we did replace the batteries or we did go back and do that repair, is noted sometimes that's not easily found... and takes time to follow up and keep track of.

JONATHAN

2:59 Okay. So, I guess one of my kinda big questions is, you know, you mentioned the reports aren't coming back to the office. Are those reports being done? Is that the fhilablef, filable PDF version or are those like paper forms?

RYAN

3:14 They're the phillable PDFS?

JONATHAN

3:16 Okay. And so they're just is, I guess, the process right now, like they fill them out and they're supposed to, you know, e-mail them back to you?

RYAN

3:24 Yes.

RYAN

3:25 Correct.

JONATHAN

3:26 Okay. Yeah. So.

RYAN

3:28 Just getting back in a timely manner.

JONATHAN

3:30 Yeah, absolutely. Well, how, what's the time lag usually?

RYAN

3:35 It depends on the technician.

RYAN

3:39 It's more of just to stop, you know, stop following up with them and just have obviously something that I've used service right in the past. So, I know kind of the back side, but yeah, just following up in general, with them versus having something that, you know... something that follows up for them.

JONATHAN

4:03 Yeah, absolutely. So, I mean, because generally, you know, what happens if they don't get their report in, then it just delays everything post that. So you quotes out for the repair as well as, you know, if there's you know, just getting it to your customer and then ultimately, you know, billing for the job that was done, is that, you know, sound pretty accurate for what you all, you know, experience from that?

RYAN

4:26 Correct.

JONATHAN

4:27 Okay.

RYAN

4:28 But in having to stop, you know, using something to make sure that, you know, I guess as a double or triple check to make sure that everything is getting done correctly?

JONATHAN

4:37 Yeah, absolutely. And then Ryan, where have you used service straight at previously?

RYAN

4:44 I use service trade at abc fire in Reno and then at triple a fire up in Seattle.

JONATHAN

4:50 Okay, perfect. Yeah. So, so you're pretty familiar with, I guess, you know, the way the office works as well as.

RYAN

4:55 I haven't seen it in. It's been seven years or so.

JONATHAN

4:59 Okay. Yeah.

RYAN

5:01 I'm sure you guys have made some kinds of improvements and stuff, but.

JONATHAN

5:04 Yeah, I'm sure. We have over that period of time. Did you, are you familiar with it from the office standpoint or from the technician side or? Okay, perfect. Yeah, good. So, hopefully.

RYAN

5:16 Teresa and Zach haven't seen it. So let's just roll with that.

JONATHAN

5:20 Absolutely. No, I'll do like a full, you know, overhead demo of service trade. We'll look at the office and, the technician aspect for sure.

RYAN

5:29 Perfect.

JONATHAN

5:31 You know, Zach, what about you? You know, in the field as a technician? What, what are the main, things, you know, you're running into in your day to day that, you know, you would like to see an improvement in.

RYAN

5:45 You...

ZACHARY

5:46 Know, the transfer of technicians, notes to another technician, is always, you know, extremely valuable, and it's you know, just hard to do with the kind of maybe traditional non flexible syllable PDF,, and, or paper, you know, just, from contacts to even, you know, like locations, you know, pin pins on maps, you know, where do you exactly go, and then photographs, right? Like, we transfer photographs a lot between each other, but we're using text messages and e-mail but there's a platform that's really gathering all that.

JONATHAN

6:19 Gotcha. So a lot of the time, you just kinda, you know, when you're in the field, you want to obviously see notes that a technician might have left from their previous visit out there and service history, right? So you can kinda see what they did in any pictures that they may have gathered on that location?

ZACHARY

6:35 Yeah, yeah, exactly.

JONATHAN

6:37 Yeah. So right now, are you guys just calling each other and texting around you said?

ZACHARY

6:43 Pretty much.

JONATHAN

6:45 Okay. I guess what would be, you know, what would be the main advantage to you? If you just didn't have to do that and you had that service history, you know, in an app to reference.

ZACHARY

6:57 Yeah. I mean, saving time and energy, right? I mean, we know, you know, what we're getting into before we even get there may be a little more prepared with, you know, equipment, you know, ladders, you know, why? Why go into a building? If, you know, you already know, you need to carry a six foot or an eight foot. I mean, if someone left a note on that, it could save you some time and a trip.

JONATHAN

7:15 Yeah, absolutely. I mean, is this something that comes up frequently?

ZACHARY

7:20 Yeah, definitely.

JONATHAN

7:21 Okay. So then what, you let Teresa know that basically, we gotta reschedule this job.

ZACHARY

7:28 Yeah, yeah, rescheduled, or, you know, back, with the proper equipment sometimes, right? We do a pretty good job of putting notes in the file and all that, but sometimes things change, you know?

JONATHAN

7:39 Yeah, absolutely. Thanks.

ZACHARY

7:40 They don't get.

JONATHAN

7:41 Changing. Yeah, absolutely. So, yeah, you don't want to run out there, and either not be able to do the job or have to turn around and go grab a different, you know, size lad or something a small detail like that and waste a couple.

RYAN

7:56 Yeah, precisely.

JONATHAN

7:57 Yeah, absolutely. You know, Teresa. I also know that you mentioned to as that, you know, you looked at a couple of other platforms, InspectPoint BuildOps are the two that she has listed anything, that you liked about those platforms?

RYAN

8:16 I mean, they all, they both work... they have the same options to offer, I think and are pretty user friendly. So, without diving into it, I mean, with the demos, it's kind of hard to do everything because it's not really hands on. Yeah.

JONATHAN

8:35 Absolutely. Anything in particular that you maybe didn't like about those platforms that, you know, wouldn't want in a software?

RYAN

8:44 I think one of the things we saw that we didn't and I'm not sure if you guys can do is we'd like to see like, you know, a map that has, so, let's say if I say my technician an hour and a half away and he's doing an inspection. If there's other inspections in that area or like if we're looking forward for the month of November, you know, do you guys have a map that has the pins of all of our customers on it? So then we can kind of build a route around that.

JONATHAN

9:13 Yeah. So, basically, and I'll show you this like we do have a map based scheduler and that's pretty much what I'll do. I'll drop pins for where you have jobs upcoming based on the filters that you can set one of those being a date range. And that way you can kinda just see what's close to each other. So, when you do build your technicians schedules out, you can, you know, schedule them essentially to an area so they can, you know, spend the least amount of time, you know, windshield time and, the most amount of time actually on site taking care of your customers.

RYAN

9:43 Perfect. Yeah, because, we cover a wide range of land if you will, typically, you know, from the Canadian border to the Mexico border. So sometimes we jump on a plane and we run a car and go do a service. But it would be nice to know that, hey, at the end of this month, you know, the customer right down the road from where we're doing the emergency call is due. And right now, that's kinda hard to compile.

JONATHAN

10:08 Yeah. So you would definitely just want to have good visibility, to knock those out instead of figuring out and you got to turn around and go back down the.

RYAN

10:15 Right.

JONATHAN

10:15 Weeks later.

RYAN

10:16 Right. Yeah.

JONATHAN

10:19 So, I guess, you know, my always, my question is when things like that come up because it sounds like it just takes a lot of time, you know, how are you handling that today?

RYAN

10:31 We're pretty good at storing information in our brain. I mean, we have an excel sheet, that does pretty well, you know, saying, but it's... we don't do, you know, our main customers aren't the home depots and strip models of the world. Our, our main customers are data centers, you know, verizon tents, those kinds of places, secure locations. And so we don't have a huge like big company service base in that sense. So, a lot of times it's easy to remember. Yeah, has been a while since we've been there. Let's look it up.

JONATHAN

11:06 But...

RYAN

11:07 It would be, I'd be a lot faster to know, you know, just be able to like pull a map and say, hey, let's do in the next two months in this area.

--- *Small Talk* ---

JONATHAN

11:14 Yeah, absolutely. I mean, take human air out of it as.

RYAN

11:19 Right.

JONATHAN

11:19 Right.

RYAN

11:20 Right. And, you know, and the other side of that is, I mean, like everybody, we like to go on vacation and so, we, you know, one of our team members goes on vacation and they know that area and I know this area, what, and then it just becomes more, you know, back and forth.

JONATHAN

11:36 Yeah, absolutely. Yeah. So, I guess before we kinda do get in into, you know, the nuts and bolts, of the meeting... you know, any like goals for the next like 12 months as far as the business goes that you all are trying to accomplish that, you think, you know, a software would help out with or whether it's you know, headcount or just, you know, making maybe just hitting more services on time.

RYAN

12:04 I mean, on time obviously, but we're, a lot of it is just being efficient. You know, we live in the Seattle metro area. So, you know, 20 to drive 29 Miles. I mean, yesterday, it took me two hours, you know, and so efficiency is a big thing.

--- *Small Talk ends* ---

RYAN

12:20 And again, the map will help with that being efficient being, you know, where we show up on job site and get, you know, get the job done and like, you know, like exactly the same as with a platform that we can look at pictures, you know, or, you know, we, if we send a work order to a technician, he can go look at the pictures. I mean, we have most of that stuff on our server, but obviously our servers very protected in the sense. So we don't want anybody just going in and, you know, pressing the lead on the server or anything along those lines. So.

JONATHAN

12:54 We...

RYAN

12:54 Don't want to be able to give technicians access to our back end server.

RYAN

12:59 Or...

RYAN

12:59 For that, so, you know, a non, if you will a non proprietary platform, so they can look at a customer and see those pictures right at the customer when we issue a work order would help out a lot. Yeah.

JONATHAN

13:12 Absolutely. Very good. Well, I'm you know, just after our short talk and we'll definitely know discuss some more things as we kinda, you know, go through it but excited to show you all service trade. You know, I know you've seen it before Ryan, but it's been a while, you know, we can definitely hit on everything you all are looking for at different degrees. So, you know, really excited just to get in there and like feel any additional questions you all have... to make sure that service trade makes sense where, you know, there's three you on the call. But as you go through your evaluations, like who else is going to be involved in? Like, you know, pulling the trigger, on a tool?

RYAN

13:52 It'd probably be us three.

JONATHAN

13:53 Okay, very good. Well, wanna definitely make sure that we make the best use of your time today. So, unless there's something that hasn't been mentioned that's top of mind for any of you three. Now, I'll go ahead and jump into it. You know, is there anything else that you'd like to mention?

RYAN

14:12 Not at this time. I think if they come up, we'll definitely stop you and ask a.

RYAN

14:17 Obviously, we'd like to see as well as what you guys do for inspection reports or do you guys use ours or, you know, that kind of stuff? We've noticed a lot of companies, you know, the ones, that offer inspection reports, most of them, you know, they focus around fire alarm, they focus around sprinklers, we're a clean agent that's all we do and so getting reports specified for what we're looking for is big as well, or even using the ones that we already have.

JONATHAN

14:44 Yeah. So obviously answer that question. Now, essentially, as far as service trade goes, there's two options, right? So the first and probably the most popular when people start with service trade is to just use your own forms. Now we can put those into service trade for you. So basically when, your technician opens them up in the field, I know it's gonna look the exact same, still going to be your fill able PDF, but we're gonna pre fill, we can set what we call smart rules, pre filled customer information up top, pre, fill the equipment information, you know, in the actual forms to where they just have to go through. And just like check the boxes if you will and fill out the inspection itself, answering the questions. So save a lot of time there. We do have an add on feature that's called inspection manager. You know, it gets a little bit of a bump in price if you will.

--- Pricing ---

JONATHAN

15:31 And so that's why people tend to, you know, grow into it like 10, 12 months down the road once they've you know, gotten used to service trade as far as running their business goes, but we do have different options, to either start at or, you know, grow into.

RYAN

15:47 Okay. Bye.

JONATHAN

15:51 Cool. Well, I'll share my screen, give you a quick background on us. And then we'll look at we'll, look at the tool itself.

RYAN

15:59 Okay. I...

JONATHAN

16:01 Can you all see my screen?

RYAN

16:03 I can.

JONATHAN

16:04 Perfect. Had some, got a bunch of stuff on my screen. Let me just had some things. So just service trade. You know, we've been in business for over 11 years now, we do have over 13 active accounts, customers throughout North America. Last year. They were able to service over 10 percent of all the US commercial industrial buildings that accounted for over 13,000,000 assets being managed through our platform. And then they were able to, you know, generate over seven and a half 1,000,000,000 dollars worth of revenue to E, through service trade. And then we are built specifically for, you know, commercial contractors. And we do focus on the fire life safety aspect as well as like commercial mechanical contractors... pretty much what we aim to do for our customers really just help you all control your cost and grow your quality revenue. We consider that just to be the revenue that you're making from like your top 10 percent of your customers, how we go about doing it is really just helping, you know, improve your operations in the office and then setting your technicians up for success in the field. That tends to just free up time, you know, for you to be able to actually go out, you know, sell more service work agreements, you know, build your customer base just by being more efficient. And it also allows you just to increase your customers loyalty and strengthen your brands and your local markets. We've pretty much developed what we call the profit platform. It's just five key as of your business where we really, you know, hone in and help drive efficiency and streamline things. So to quickly kinda run through them. All the ours is really just going to be office coordination. So, you know, service trade. We're going to help manage and execute on all your, you know, work orders and in work agreements, we'll automatically create work orders when work becomes due, and just help, you know, manage everything from scheduling and dispatching that job out all the way through. You know, you can actually create the invoice in service trade. So just the whole, you know, totality of the job. Basically, we'll help free your office up to be able to, you know, more accurately track parts in the field. Your technicians can clock in and out of jobs. So you'll be able to just kinda know where they're at and what parts they're using and just allow you to more accurately project and track part, and labor costs associated with each job.

RYAN

18:25 So, I got, I just stop here there for check in parts. I got a question. So, if we sold, let's say a 1,000 batteries last year, can you guys run reports on how many batteries we sold? So say January first, if we wanted to buy a 1,000 batteries, or know how many batteries we sold last year? Is that something you guys can do like January reports in that sense?

JONATHAN

18:44 Excuse...

RYAN

18:44 Me...

JONATHAN

18:45 You can run essentially, we call it a consumption report. So that's exactly, you know, kind of the kind of the numbers it would give you. I'd let you know how many, you use. So that way, yeah, you can know, hey, we used a 1,000 of these last year and it give you a good ballpark until, you know, what you're most likely gonna use.

--- *Pricing ends* ---

RYAN

19:03 Can you do it by month as well?

JONATHAN

19:06 Yeah, you can set a filter, to have it, throw it out by.

RYAN

19:10 Okay.

JONATHAN

19:12 And I think you can actually filter it down by specific customer as well so you can kind of break it down to whatever different level you would want to see it.

RYAN

19:19 Yeah. Okay.

JONATHAN

19:23 For your text, so basically out in the field, your text are going to have, you know, all the information, they need to do really good high quality work for your customers. So in the app they'll have, you know, task lists, location, contacts as well as you know, a complete location and service history that they can reference. We make it really easy for them to, you know, record any parts used to the amount of labor for each job and really any other information. So they can leave comments that, you know, the next tech out there can view as well as you all back in the office, they can attach any completed paperwork of course to the job including you anything that's custom or maybe just, you know, obviously your inspection reports and then at the end of the job, you know, they can get a signature from your customer, just having them sign off on the fact that you did the work to the standards that was required. And then there's a lot of permission based settings for the app. So you can give them permission to, you know, invoice, a job, put a quote together for a repair that's not really the standard functionality, but it's in there for you to kinda turn off and on if you want them to give like a more senior tech, you know, some more responsibility in the field. It's functionality that's there for you... your customers experience. So they'll get a lot from you all using service trade basically, you know, you'll be sharing real time updates from the start to finish of each job. So they'll get a notification when you're text in route, you'll send them after job reports that will include any photos completed paperwork as well as really a detailed summary of any issues that are, you know, your technicians came across in the field. We'll kind of put that all together and consolidate it into an after job report for you that you can send to your customer... as well as, you know, you can put your quotes together through service trade where your customers can view them and approve them with the click of a button and same thing with invoices. If you wanted to invoice through service trade not only can they view those invoices, but you can set it up to collect payments through service trade as well... management. So you all back in office, really, it's going to give you visibility into kind of everything going on with, your customers. So because all your data for your customers is going to be in one central system. You're only going to have to look into one place. If there's an issue with an account. So you can just kinda look into service trade, see what's been going on out there lately, you know, come up with a quick resolution for your customer and just get back with them. You know, as quickly as possible. You know, at the end of the day, our goal is to have, you will be able to reference that information and be able to save that business relationship because, you know, the last thing you wanna do is just lose a customer over something that boils down to, you know, a simple miscommunication. But, you know, we'll kinda have all that in one place for you all to reference. And then last thing is just gonna be, you know, overall sales success. So, you know, as you're reporting deficiencies and tracking, you know, customers, equipment issues in service trade, you can kinda prioritize those to siding, you know, what's going to be the best opportunity for us, to put a quote together and try to bring in, some pool through revenue. You can set up quote templates to help streamline that process. And we'll certainly go through that, in the product. But really, it's just gonna give you it's gonna act as like a sales automation tool, it for you all to be able to manage that work. And then to kinda wrap it all back around once your customer approves that quote for repair. You know, we're going to create that work order for you, drop it in your lap in the office to where you'll just have to, you know, schedule and dispatch it out so your technician can get out there and actually do that repair and, you know, update it from, you know, needs repair to it's. Actually been fixed at that point.

RYAN

23:00 Do you guys have any connection with the compliance engine? I know they're growing in.

JONATHAN

23:06 We are working on that. Yes. So we don't have a direct integration with them. Currently, they hold that key really tightly, but I can't tell you that they, we will have it, you know, within like the next 12 months. It's something we're actively working on with them.

RYAN

23:23 Okay.

JONATHAN

23:27 Great questions. You know, before we kinda jump into out of these five areas, any one or two, you know, stick out to you more than another.

RYAN

23:37 They all look good.

JONATHAN

23:42 All right. I'll go ahead and just move into the, to the product then and we'll kinda start working through it... you know, kind of like I mentioned and Theresa, like you mentioned, I like to try to keep these as conversational as possible. So as I'm going through it, feel free to interrupt me and ask your questions and, you know, I'll do my best obviously to answer them. Might have to follow up with, you know, tomorrow, with an answer. If there's something I don't know but, you know, basically service trade. So there's three views there's. The office view, the tech view, which is the app and then that customer experience, which is the quotes and invoices. We'll take a quick look at each. I'll go through like a mock workflow, bounce back and forth... but essentially starting out in the office view. So you'll have your service dashboard is essentially be like your homepage. It's going to be like a bird's eye view of everything going on in the business. So there's five buckets daily schedule. It's pretty self explanatory, it's you know, what tech is working where with the clickable link to their work order and a quick description of the type of job that they're on... overdue jobs without appointments. So you'll put your recurring services into service trade... we'll track those in the background. This bucket is just gonna let you know anything that's passed do. So maybe these jobs are suppose to be done, you know, sometime in the month of September. I obviously we're in the second week of October now. So we would just flag these, let you know, top priority to get out to these. These services are actually passed. Do... anything coming do in the next two weeks? Again based off those, you know, recurring services, we'll drop in this bucket, let you know what's right around the corner. This will be the default timeline for the bucket on your dashboard which you can run a report, you know, showing you what's a month out. You can set a custom date range to look as far, you know, ahead as you would like. But well, 100 percent flag those jobs, that are up next... jobs to be marked complete. So these are the jobs that essentially your technician, you know, completes in the field mark marks has done on their end of the work order. We'll put it in this bucket letting you in the office know, hey, this is done. But what we're gonna want you to do is you know, open the work order up, make sure everything's accurate. You know, every parts there, all the pricing is right? All the paperwork is completed and attached that way, you know, prior to actually being sent to your customer, you just know that, you know, it's more than likely 100 percent, right? And just given that professional appearance by the time it gets to your customer. And then jobs completed jobs be invoice. So that will be any of these jobs that the office marks is completed. But for whatever reason, you haven't created an invoice for it. So we'll just let you know basically like, you know, this job is done, but we never build for it again, just letting you know where everything's at making sure nothing's slipping through the cracks and that you're communicating to your customer in a pretty quick manner of, you know, anything they might need to know about what's going on at their proper.

RYAN

26:39 Got you.

JONATHAN

26:43 Any, any thoughts or questions, on this dashboard and how you might like incorporate it into your operations currently or how it might help?

RYAN

26:52 No, it looks clean. It looks clean. Obviously, you know, we talked about the map. I'd like to see on that, but I'm sure you, you'll get to that here eventually.

JONATHAN

27:01 Yeah, I'll hop in there right now. So basically, you know, under jobs scheduling, there's it's the scheduling tool. First thing that I'll pop up, it just be your filters menu. So you obviously won't have this many offices, but this is where you can kinda set your filters. So your date range, I'll just do anything due this month, service lines. So we would only put into your account what you actually worked on. So you wouldn't have this extensive list to kinda scroll through. And then the job type. So set your filters. All that's gonna do is let us know, you know, which pins to drop on the map.

RYAN

27:39 Got you.

JONATHAN

27:40 Excuse me. So this is what it's gonna look like. Again, these pins are where you have jobs coming up based on those filters. Your text will be listed on the left hand side. Each tech will have a color. Most jobs, a couple of these have been scheduled out, but most of them are gonna start out light gray so that's unscheduled but essentially, you know, again, it's just gonna show you where you have worked at. So we would probably schedule these three jobs to the same technician, right? And then just to schedule a job, you just click on the pin, you know, pick the date and then click on, you know, the little person down here to assign a technician at that point, you know, it would change it to whatever color my pin was, and it would put it on my app for that day. Let me know, you know, that I needed to get out there as well as, you know, all the information from.

RYAN

28:27 Work order.

JONATHAN

28:27 So pretty quick and easy way, to filter your jobs to see where they're at, and also just to get them scheduled out.

RYAN

28:34 Got you. We ran by month or week or?

RYAN

28:39 Or whatever.

JONATHAN

28:40 Yeah. So, you know, I've got it for to be due this month. We've got, some preset things, but then there's always the custom date range that you can set.

RYAN

28:50 Okay. And we can filter by customer in there as well.

JONATHAN

28:55 You can't filter. I don't think you can filter by customer. You can just filter by, you know, which jobs are, in the area or not, which jobs are in the area.

RYAN

29:07 But if we, I'm sure back if we click on the parent customer, it would show us all the locations of the individual sites.

JONATHAN

29:16 What do you mean by parent customer?

RYAN

29:18 Let's say like 18 T. So if 18, T is the parent and then they have 50 sites in the area. Would it show all the sites as well?

JONATHAN

29:29 Yeah. So, these like pins would be like those individual at NTS. So say all four, these were at and T, based on the filters that we have of like, you know, what services do we have? Do? If these four locations meet that, those are the pins, it's gonna drop.

RYAN

29:48 Okay.

JONATHAN

29:52 So that, yeah, that, that's the scheduling tool. It's pretty clean and basic, you know, just Google map based scheduler.

RYAN

29:58 Send them an e-mail or anything along those lines, the technician that something's been added to their... or is it just the well?

JONATHAN

30:08 Yeah, it's just gonna go onto their, into their app on like pretty much they're going to have, a home screen that's going to have a list of their work orders for the day. So if you added, it would just throw it on that list and you probably best practice would be just for you or whomever you know, put it on there just to send them a text and let them know that you added that job.

RYAN

30:26 Okay.

JONATHAN

30:29 So I'll hop out of here. And then pretty much these next two tabs is just how we, you know, organize your customer information, probably going to be really useful for you all. Especially like, so the first tab is just gonna be basically your billing address. So, you know, your example of like at and T just have one billing address. And then, you know, multiple locations that you service, each a and T, T and T physical property is gonna get its own file if you will, where you can kinda click into that building and see what goes on out there or what we've done in the past. So I'll open up like the brewing company. And basically that's what this is, what it's gonna look like underneath each physical property where you do work. So, you know, you can put your contacts in, for the individual location services is going to be, you know, this is what you do out here. This is where you would kinda put a complete rundown of what you need your text to do as well as set it up for how often you need to reoccur. So I've got, you know, this is just a annual sprinkler inspection. But really all you do is you come in here, build out, your description of work. And then to, you know, you could put your line items for the stuff. You know, you're definitely going to be charging for.

--- Pricing ---

JONATHAN

31:43 And then really just to set it up is like, so I've got it set to be an annual, but say it was like a quarterly, you know, I'll just pick for it to be do any time in the month we'll start in January. And then how often should it occur? We'll pick monthly. And then for, you know, that quarterly, we'll do you know, have it repeat this service, repeat every three months? So that's where you kinda set these up. So then we can start flagging them on your dashboard for you, letting, you know, what services do, where and when...

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RYAN

32:12 Got you.

JONATHAN

32:14 Yeah, really quick and easy to set those up. And then, of course, you know, you can do your annuals for, you know, as far out as you need, however often they need to, you know, actually.

RYAN

32:25 And we can, I see the asset to service, are those preset, or we can add like we can customize name for?

RYAN

32:33 Assets?

JONATHAN

32:34 Yeah. So, great question. So, you actually build out those assets. So.

RYAN

32:38 Okay.

JONATHAN

32:38 The assets would also be under the property and, they'll be location specific. You know what I mean? So, at, and T, you know, three might have different make and model than, you know, 27 for whatever reason, but you can come in here, you know, and build the systems out. So, you know, you can put as much or as little information in here as you need. You certainly don't have to fill it all out. You can edit things change. But that way, you know, what you're walking into for an inspection as well as if you need to quote a repair, you know, exactly what making models on the property. So you can get the, you know, a correct a quote to your customer.

RYAN

33:17 Right. So, you see where it says sprinkler right there, is that an editable? Like do you guys have something for clean agent? Is that a thing in you guys?

JONATHAN

33:27 Yeah, I think, I mean, I might just be under sprinkler, but, let me just click ask.

RYAN

33:32 I just, yeah.

JONATHAN

33:34 I see. Yeah. So right here, clean agent and you, there's different ways you can set them up depending on how you wanna, you know, actually break it down?

RYAN

33:42 Okay. And can we edit? Like, can we add our own, see where it says clean age and clean age, and so on? Or can we add our own asset there as well? Like where we get a name, the asset?

JONATHAN

33:53 What would you want? What would you want? Like top of your head as an example? Because we might have it in here. Yeah.

RYAN

33:58 We like, we do initiators that are due every five years or, you know, GC a just something along those.

RYAN

34:09 Lines.

JONATHAN

34:12 So, if it's not already in here.

RYAN

34:15 It's not deal break. I'm just curious on editability.

JONATHAN

34:18 Yeah. So the way that works is like you can't add it yourself. But how we handle that because it's very common is like once you're a service trade customer, you'll have like an account manager who's essentially your single point of contact. You would just put a request in to have that asset added. And then, you know, he or she would kinda take that back to our software people and they would actually, you know, add that for you so you all can't do it, but you just put a request in for it to be done.

RYAN

34:48 Yeah, because we do like hoses every five years and stuff along those like.

JONATHAN

34:51 Yeah, absolutely. So that, that's kinda the workflow rather than... given anybody like full power to do that. We kinda just handle at make sure everything gets mapped on the back end correctly. Okay. Yeah. So also, there's full service history of any jobs. Your text will have access to this and a few as well. Any deficiencies we, we've reported at all times. So we can reference those. Any quotes. We put together any comments regarding, the building. So we do have like a ladder specific comment on this example. It will show who makes the comment. This will be visible to the office as well as the text.

RYAN

35:31 But not to the customer, right?

JONATHAN

35:33 No, not to the customer. And then office and technicians can both add comments. So if something changes, you know, point of contact changes, access code changes, anybody can kinda edit that. That way the next person out there has that information and then attachments will just be like miscellaneous things that you want to, you know, include about the property. So you can reference it in the office or you maybe your technician can reference it in a field. Again, the goal is really just to get on and off the property as quickly as possible.

RYAN

36:05 Right.

JONATHAN

36:07 So, a lot of different information obviously regarding your customers can kinda be stored in service trade, but.

RYAN

36:13 Can you go back to that last tab that shows the, I think you call it the billing to address?

JONATHAN

36:20 Yeah, right here.

RYAN

36:21 And then scroll down to your map. Yeah. Okay. That's what I was looking for. So that.

JONATHAN

36:27 Okay.

RYAN

36:28 That's got the pins for like if a TNT was Bill to and then all of their locations underneath it, that's got the pins for where they're all located.

JONATHAN

36:35 Yep. Absolutely.

RYAN

36:37 And are you guys only held to by addresses or can we also put latitude longitude in?

JONATHAN

36:44 It's just gonna be addresses, but, it is like Google map base. So these pins, are pretty accurate.

RYAN

36:53 Okay. I just, I, yeah, because, we do some radio towers on top of mountains.

ZACHARY

36:57 Okay. Don't that literally don't have an address?

JONATHAN

37:00 Yeah, that, it... we have a...

RYAN

37:05 The people don't usually go to.

JONATHAN

37:07 Yeah, they don't have an address. Yeah, I got you.

JONATHAN

37:15 So, any, you know, initial thoughts, or just questions on how we're organizing and keeping your customers data... you know, within ServiceTrade compared to, you know, either how you're doing it now, or where you're looking, to take it.

RYAN

37:31 I mean, you mentioned, you know, keeping data and stuff. So it always comes up and we've always asked questions. So what if, you know, we're with you guys for five years and, you know, we want to leave, how do we, what's the download like to just offload? I mean, the, you had a very large competitor. It kind of worries us a little bit, but you had a very large competitor that was doing exactly what you guys are doing and they got bought out by a very large fire company. So what, how does that work with you guys? Like, getting our stuff off as a whole? What does that look like?

JONATHAN

38:05 Yeah. So, great question. Basically if it would come to that, you know, you didn't want to be a ServiceTrade customer anymore. We, you know, we export your, all your data into like a CSV like excel file and just give it back to you. So, you know, we store it for you, I, your customer. But if you ever, you don't wanna leave, you know, we just.

RYAN

38:26 With all the pictures and inspection reports, everything.

JONATHAN

38:31 Absolutely. Okay. Yeah. So, we just house it and store up for you why you're a customer? We don't we don't own it. So if you ever want it back, to leave, we give you everything that you gave us plus have collected as your time as a customer and, you know, just part ways.

RYAN

38:48 Okay.

JONATHAN

38:53 Before I jump into the, you know, the app basically, this is what the work order is gonna look like from the offices standpoint? Pretty basic stuff, customer information, you know, when to schedule the tech on the job, you can, you know, put multiple technicians, any line items you do want to include. And then, you know, I'll collect some more information in the field. And then I'll revisit these tabs just to kinda show you how information, you know, moves back and forth between the field and the office.

RYAN

39:20 Yeah.

JONATHAN

39:23 So, this is the, this is the app, right? So this is kinda, this is my schedule for the day. This is how your technicians would look. It's just the different work orders they need to go to.

RYAN

39:32 That looks like a salesman day, start off a top golf and end at a burn.

JONATHAN

39:37 I mean...

RYAN

39:37 It's funny.

JONATHAN

39:41 It's and there's a large gap in between, but.

ZACHARY

39:44 All right.

JONATHAN

39:47 So, yeah, basically, this is what they've got, you know, if you added anything, it would just kinda drop it in this slot. What they'll do is just kinda click into the work order. This is just a screen share like my iPhone. So it does work on apple and android, you know, phones and tablets. So like no device limitations from that end. And this is their work order, right? So, you know, I've been in route for about 16 minutes. They can click on the orange banner, click notify customer and then just pick their eta, fire off an e-mail to your customer. So they know, you know, you're still coming and in what time to expect you. And then once they're on site, they'll click clock out, we'll ask or you on site, they'll click okay, and it's gonna clock them in on site just to start tracking time on site for you. And, you know, they'll have these eight tiles essentially, to kinda work through. So services is just kind of what we're out there to do with that description of work that you set up on their work order comments. So this is where, you know, those comments live. And then a technician can actually add comments. If something changes. Again, we'll time and date stamp in and, you know, put the name of who left the comment... attachments. So this would be, you know, just anything miscellaneous, that you or your technicians want to attach a.

RYAN

41:13 How let's talk about that. So how does pictures get added? So, can they, is it something they have to take the pictures of? Like can they take 30 pictures on their phone and then attach all at one time? Or do we have to be in the app and take one picture, one picture, one picture, one picture.

JONATHAN

41:28 Yeah. So it's really an option. So if you go into attachments and then click like add attachment, you can do both, you can either take a photo or you can just add them from your.

RYAN

41:37 Library? Perfect.

JONATHAN

41:40 Same thing. Like if you needed to scan a document, you know, it's just gonna scan that in... no limitations on how many like photos you can attach. Either. Yeah contacts will be phone numbers, emails for the location that they might need items. So that's gonna be well, I click back instead of into items. So items is going to be basically, you know, any items we put on the work order, but also if they use a part that we didn't anticipate or maybe we didn't know because we were just going out there to diagnose the issue, you, they can add the part. You know, we can set your items up in ServiceTrade for you and they can just select them from the list. I'll just use a fog, no, just cause it's at the top. And then the only thing that they'll have to put is like the service line. So, you know, I'll put, I'll just put a fire hose and then say we use three of them and then they can add that. Basically it's gonna add it to the work order just so you know, when you all go to Bill it, you're billing for everything that was used, your technician doesn't have to text you or, you know, send you that information any other way to make sure we get built for it. They can just kinda, you know, add it as they're using these parts in the field.

RYAN

42:57 Okay.

JONATHAN

42:58 And then assets, so this is probably, you know, one of the more important tabs. And basically this is what they're out there to work on. You know, that piece of equipment is going to be tied to the work order. Yours would obviously be more specific than this the way you named it, but they can click into it and this is where they can kind of view that full service history. So, these are any work orders in the past? Whether they've worked on them or not, you know, they can see what past technicians have been up to. They can view any deficiencies that may have been reported on. This piece of equipment doesn't like anything's been reported. So we know that there's no outstanding issues, but they can get a really good background on everything that's happened in the past. You know, if they've never been out there before or it's been a while since they've been to that specific location.

RYAN

43:43 So question is, if maybe I'm jumping ahead, but if they let's say we don't have a work order, can they still search our customer base to find a customer? That, if we have an issue in work order, say they got an emergency call, two o'clock in the morning? Can they, can they search, our customer list to find, you know, what is at that location before a work order is actually issued and pushed to their?

RYAN

44:11 Problem is that the...

RYAN

44:12 Thing?

JONATHAN

44:14 But they would have to, they would have to log in to like, this web based?

RYAN

44:20 Okay.

JONATHAN

44:21 And then you can just say, you know, you can, there's a lot of different pre or controlled. So you can limit visibility. So that way technician, does, you know, you probably don't want them to see, you know, certain information regarding the business. So you...

RYAN

44:36 Okay. So if they want, if it's not pushed to them, they would all of our guys have laptop. So they would just have to drop on their laptop and look at it on the web portal.

JONATHAN

44:45 Yeah, absolutely. And because they would be able, to essentially see this view, right?

RYAN

44:50 Here, right? Okay.

JONATHAN

44:55 And then as far as like deficiencies go. So, I know, you know, basically we talked about attachments here. Like if they're going through, you know, their inspection, they do come across the deficiency. First of all, this tab will show them anything opened or all the time that they can reference. But what we'll really want them to do is add their deficiencies, you know, through this. It's going to be advantageous for you all back in the office for them to do it this way they can put a quick description. So I'll just do a creative sprinkler head. But the second prompt is again going to be for them to add attachments. So same thing. They...

RYAN

45:31 It does prompt them to add pictures for efficiency.

JONATHAN

45:35 Yeah. So like this, there's basically like seven steps that they're going to go through first is just a quick description of what they're seeing and then they'll hit next and it's gonna, the second step is gonna be for them, to add attachments. So it's gonna look the same as far as what they can do. Just individual photos. They can take them and upload them from their library, whatever is easiest or their preferred workflow. But what they'll do, I'll just click take photo. They can take a quick photo of it. We'll click use them. We'll add it. This is just gonna add it to the work order and then they'll go through the additional prompts which is gonna be like severity. So small issue will just put suggested something like code sprinkler hood will work, is inoperable. We will ask them to tie it to the piece of equipment that they're reporting it on. That way we can kinda just build out that history as your technicians kinda out there, you know, on the job reporting it, this next page, it'll pre populate they can change it if they need to. And then just the status. So we'll market is new. We just found it well updated to fix once it's prepared and then verify it's. Gonna be like we send a quote to the customer about this deficiency. They approve it. At that point. The status would be updated to verify just so we can kinda track it as it moves along. And then last, we'll just have your technician. I don't know who that is. I wanna click the wrong button. Have your technician put in the proposed solution. So I'll just put replace and then they'll just save it to the work order. So you can see there's 39 deficiencies been reported on this property all time. And then basically everything that we've collected in the field is being tied back to, the work order and the office as.

RYAN

47:28 So after a deficiency is completed, does that number go back to let's say that gets fixed? Does that number go back to 38 or come down to zero if all deficiencies. So when they open this up, they see that there's zero deficiencies or is that number just always constantly climbing as they find deficiencies over time?

JONATHAN

47:45 So this is just going to be an all time tally of everything found all time. So it's going to be like this all number open.

RYAN

47:52 Open door fixed. Got you.

JONATHAN

47:54 Opens is going to be anything we haven't fixed to say like, you know, say.

ZACHARY

47:58 I...

JONATHAN

47:58 Make my way down to, you know, an at and T that we haven't been to in a while. I open my app up and I see that we still have, you know, a deficiency open from last time. It's been maybe six months since somebody's been here. I, as a technician have visibility and then now I'm probably gonna call you and let you know like, hey, Ryan, like, you know, we reported it six months ago. We never fixed it or they didn't approve us to fix it. Like obviously, I'll report it again but it just allows everybody to kinda, you know, have it checks and balances, of what's happened in the past. If it does get fixed and updated, a fix, you know, it would fall under this column.

RYAN

48:33 Got you.

JONATHAN

48:37 Or I kinda, you know, jump out of the app and go. What I usually do is I'll go back to the work order in the office and just show you how information is kinda, you know, been saved back to the original.

RYAN

48:48 Do you have any questions on this?

RYAN

48:54 No, no.

ZACHARY

48:56 Moment.

JONATHAN

48:57 Jack, what are your thoughts on this? I mean, do you think this would be, this information would be useful to have in the field or, you know, I guess just in general, what are, what are your thoughts on that?

ZACHARY

49:07 Well, okay. So, so... you click comments and I haven't really seen anything that like a previous tech would have left.

JONATHAN

49:18 Yeah. So I...

ZACHARY

49:19 Don't know how the pictures come in or anything like that.

JONATHAN

49:24 Yeah. So comment, you would just, you know, technicians to say, you click add comments. First of all, you can make it specific to the job which is going to be this specific work order or you just make it specific to the location. So... I'll just put... you know, point of contact change, you know, something like that, something basic just for the example at that point, you know, it's gonna let you know, that I left that comment, you know, on this time and date and I obviously would put, you know, the point of contact that you would need. So that's kinda how that goes. And then you know, any photos you would want to reference that would kinda come through, you know, you would pull up, the old work order. So you'd go into like...

RYAN

50:12 Have to go through all of the old work orders to find the other pictures there's. Not like one bucket that has all the pictures from a site.

JONATHAN

50:20 No, I mean, what kind of pictures I guess is probably the best question that you would be looking for?

RYAN

50:24 Just assets. So like, you know, the first time going there just, you know, a picture of the tank, a picture of the control panel, a picture of, you know, just item on site.

ZACHARY

50:36 Yeah, as.

RYAN

50:39 You just put that an attachment.

JONATHAN

50:42 So, you can put that in attachments. Now, this asset is tied to this appointment, but you can also, you know, go to all, which is going to pull up all the assets, for the property that you could look into as well. And then kinda clicking into just like this alarm system, you know, basically is where you can kinda scroll through seeing information, look at any attachments, or add any attachments. And again, you could look at the services for that specific piece of equipment. I mean, there's different ways to get to the information just depending on, you know, what specifically you're looking to find?

RYAN

51:23 Okay.

JONATHAN

51:28 If you just wanted to see like deficiencies, obviously, you would kinda go into this tab, you know, and pull it up. So... you know, I'll pull this up. So there's somebody didn't take a picture, but I'll pull this one up. It's going to be the same attachment. I probably log this one. So it's gonna be the same same photo I just took. But obviously I took it, you know, back on may second to where you can open that up and see the photo. So same photo I always take, but there it is.

RYAN

51:59 Yeah.

JONATHAN

52:00 It just depends. I guess what you're looking for, where you would have to kinda, you know, go go in the app to find, you know, that photo.

RYAN

52:08 And then attachments, we could put drawing files. And now, is the attachment work order specific? Or is it location specific?

JONATHAN

52:20 It's gonna be, you know, work order specific. So you would add them, to the work orders here. Now, you can put attachments, you know, under the location that you can then, you know, include on the work order... just depends on what you.

RYAN

52:38 That automatically goes to a work order every time.

JONATHAN

52:41 This attachment, is not gonna automatically go, to the work order. No, this is just going to be there for, you know, you all to either reference in the office or attached, to the work order. If you're you know, technician needs that information.

RYAN

52:59 Okay. Yeah. Because a lot. So, a lot of kind of, I think what Zach was asking is a lot of it, a lot of times when we go to these clean agents, like we install a majority of them. So we have all the engineer drawings and stuff like that. And it would be nice if when they went there, they could pull it up and immediately see the drawings every time they go there. So if they're troubleshooting or something along those lines, they could see that drawing and be readily accessible. Is that just something more accessible just on the, this dashboard versus a phone dashboard?

JONATHAN

53:34 Yeah, absolutely. And then, so like, for instances like that as well, what customers will do like if they, you know, don't only want to just put them on this dashboard is, you know, just put that into, you know, I guess where are you guys housing that information right now? Is it on like a shared drive?

RYAN

53:50 Right.

JONATHAN

53:51 Yeah. So they could still just pull it up, you know, that way, because it's either going to be, you know, probably either through that shared drive or just on their library photo library on their phone as well. So at that point, they could pull it up, you know, in the app under like the attachments, and add it to the work order if it's something you prefer, to add to the work.

RYAN

54:11 Corner as well. Okay. Another technical question. So, how does this work on? Let's say iPad and desk desktop mode on? I can't remember the name safari, right? Can, can they log onto what you were just not the app base but can they go to ServiceTrade dot com or whatever on their iPad and see that. Does it function correctly on that sense or is it strictly like windows PC? You see what I'm saying?

JONATHAN

54:44 See this?

RYAN

54:46 Yeah.

JONATHAN

54:47 Yeah. Absolutely. So, yeah, they would just go through their web browser, whatever that is safari.

RYAN

54:52 Yeah, or Google Chrome or whatever?

JONATHAN

54:55 Yeah, just go to essentially, they'll go to service trade, dot com and then on the top right, is where they'll just click log in.

ZACHARY

55:02 Lie in?

RYAN

55:04 Okay. So if there is an iPad, they can do both, they can use the app or this way to look up prior information on jobs. Can they create their own work leaders or, is that a permission thing we turn on and off kind of deal?

JONATHAN

55:20 For them to create work orders?

RYAN

55:21 Yeah, yeah.

JONATHAN

55:23 Would be permission based.

RYAN

55:25 Okay.

JONATHAN

55:30 Anything else about the app before I kinda just revisit, the work order itself? I'm not.

RYAN

55:37 It, it asks them to clock out. I don't know if you finished on the app itself. So once everything's done, is there like a clock out and then ask them what to do on the next? Like what's the next steps there?

JONATHAN

55:49 Yeah. So I'll go ahead and do that. First of all, I mean, are you all gathering signatures post job, if possible or?

RYAN

55:57 If possible.

JONATHAN

55:59 Okay. So I'll kinda just walk through that. So basically at the end, this isn't a required step, but if you do want to get a signature, they can just click refresh just to make sure we get everything. They'll just click, you know, create work acknowledgment. And what they'll do is just, you know, pick the contact. So I'll use myself... you can turn this off. So they, you know, can't or don't need a generated invoice and not just click review. What they'll do is just kinda again, they can collect the po on site if they want, go through any parts that they use. Any deficiencies, they found your terms and conditions, you know, you'll put into service trade. So that way your customer can kinda just scroll through them and just toggle, they'll click confirm and sign. I won't send myself a copy of this, but we'll look at it in a minute and your customer would just sign off that your, you know, your team did what they needed to do... if or after they get a signature, they'll just click clock out. And then to kind of answer your question, we are gonna ask them to check off any service that they actually completed. So, you know, we did complete this service. So we'll check it as done. If we weren't done with it or didn't complete the whole thing. You know, we wouldn't check it that way in the office. We knew we still had to get back out there. And then we'll just ask, are you done with this visit? Default will be yes and no click, you know, that they want to clock out?

RYAN

57:29 Got you.

JONATHAN

57:31 Basically, what happens is.

RYAN

57:34 Can you show as well before you go there? Can you show us what like their next screen would be like where, how they know where they're going next? Like what's their?

JONATHAN

57:43 Yeah.

RYAN

57:44 You know, work order screen or whatever?

JONATHAN

57:46 Yeah. So basically they would just, you know, click back out of this work order and then whatever work orders they had remaining for the day. So, you know, I finished that one. So it's going to be gone. It's not going to be any part of the.

RYAN

57:56 Can they see tomorrow as well?

JONATHAN

57:59 So I have it filtered for today. I'm gonna turn this filter off and it, it's gonna go way back to just old jobs, but they wouldn't have jobs from last August, but they would be able to.

RYAN

58:11 Okay.

JONATHAN

58:12 Absolutely.

JONATHAN

58:19 So on the work order, basically, what happens, you know, once they clock out market as completed... it'll say completed right here, just letting us know the tech, you know, did what they needed to do. Again. We'll drop it in that bucket on the dashboard for you in the office to review. What you all would do is come in here, double check everything. So, you know, those parts that we added. They're here now... clock events. So basically, you can see I was in route for 16 minutes. I was on site for 17. It's we don't track your technicians, but whenever they're clocking in and out, we do take a snapshot of their latitude and longitude. So you can kinda see that, you know, 300 Miles away from the location I was supposed to, you know, clock in at, you can obviously click the pencil, make any adjustments that are needed, to be made from that information. The attachments. So this will be, you know, your inspection paperwork would be under here. This is pretty much a rundown of the service that we provided with the customer signature as well?

RYAN

59:28 A question on that. So like if we want to download that and store it on our own server or even let's say the inspection, I don't know if we saw an inspection report.

RYAN

59:37 For your.

RYAN

59:41 Sprinkle inspection that you just did. But if you download that, does that just come up as a randomized PDF or is it, is there, is it some way? Yeah, it's just a huge number PDF?

ZACHARY

59:55 Okay.

JONATHAN

59:55 So, like to like rename?

RYAN

59:58 For like sortability. So.

JONATHAN

1:00:00 Yeah. So, you can, well, that's probably not, so description isn't exactly what you're asking about. So, let me open it up again and kinda see what happens. So basically, you know, it's just like anything else you want to click, you know, save as a PDF, you know, you would just, you know, rename it to wherever you want it, on your, you know, desktop or in your one drive, whatever you're using.

RYAN

1:00:28 Okay.

JONATHAN

1:00:28 Looks quite safe. I'm wanted to click out of there.

RYAN

1:00:32 And then, what if, I mean are the inspection reports editable back at the office? Let's say there was a spelling error or something like that on the inspection report? Is that something we can go back and edit?

JONATHAN

1:00:42 Yeah. So that's gonna, I mean, it's probably gonna look a lot like, you know, how you're all doing it today. It's gonna essentially be through like Adobe acrobat. So you would just be able to open it up, and make those edits.

RYAN

1:00:52 Okay.

JONATHAN

1:00:58 So, the efficiency that we logged, you know, it's logged to the location, but it's also logged to the specific work order. You can have it set up to like e-mail you any time, like an operable, like a red tag deficiency is logged that way, you're not, you know, having to come in and run the reports on like those top priority repairs that e-mail would have a link taking you straight to the details page. It's just gonna show you who logged it, the customer location, the piece of equipment and anything they're saying about it.

RYAN

1:01:31 Okay. So if it's an operable, then we get an immediate notification that there's something going on.

JONATHAN

1:01:36 Yeah. I mean, you can set it up that way rather than getting emails on every single may know that need to be inundated with emails. So just kind of those top priority ones, we can send to you will obviously include any photos or videos that your technician, you know, took in the field as well as related efficiencies. So this is going to be anything reported deficient on that same piece of equipment. Historically. That way you have a really good quick idea of what's happened with it and you can put a quote together with some pretty good background and let your customer know of, you know, something we recommend repairing or it might be time to actually look into replacing this unit as well. So if you look at it, you decide, hey, this is great opportunity. Make, some additional revenue. All you do is click, you know, add to quote. You don't need to do anything here. You can click create quote. And basically what happens is we'll pull up a template for you to work off of. So I just put the work description of work to be done. Again. We can set up your parts in service trade. So you can kinda just, you know, build out your.

RYAN

1:02:50 Can we, that is being set up? Can we just write anything we want to?

JONATHAN

1:02:54 Yeah. So I'll just do I'll just do tool because I know there's like no tool part and basically, you can kinda just build it out.

RYAN

1:03:03 Okay.

JONATHAN

1:03:04 Yeah, access, is going to be the first thing in there and then you can set markup rules, for pricing and things like that. But you can certainly, you know, do one off parts, you can, you know, beyond having your initial parts list set up, you can add them, you know, add one off items as well.

RYAN

1:03:26 And you guys automatically add tax depending on location.

JONATHAN

1:03:32 So, yeah, you can kinda, do it that way and just build out your quote or you can build out a template for like your most common repairs. You know what I mean? There, there's more common deficiencies than others.

RYAN

1:03:46 I...

JONATHAN

1:03:48 It...

RYAN

1:03:49 Replace batteries. Yeah, that's fine.

JONATHAN

1:03:55 I don't know if I've got a battery one but I thought I did it's. Really not the most important thing. But whatever I'll just do, you know, a lot amount function. It doesn't matter just for sake of example, you can pick it from the template that you built. It's. Gonna pull over that description of work. As you've set it up. It's gonna pull, you can set your line items up so it'll pull anything over that, you know, for sure. You're gonna use, of course, you can click the pencil, adjust your quantities, adjust your costs, and then add any additional line items that need to be for the specific quote just to kind of speed that process up. And then you can select basically how this quote gets displayed to your customers. So... are you all usually just doing grand total only or do you break it down by line item?

RYAN

1:04:42 You just grand total only?

JONATHAN

1:04:43 Yeah. So select that. You can change it if you need. And then you'll just e-mail it to your customer straight from here. I'll e-mail, it, to myself and then we'll just take a look at it, you know, together. But essentially what it's gonna look like, this will be your customers or your company's logo. So it'll be branded for you all. And it's just going to have that description of work that, we need to do the cost. Again. Your terms and conditions for quotes will be attached to the bottom of each one. And then we'll pull over, any photos of that deficiency just to help, you know, drive the urgency for your customer to approve this, so they can see why we're sending, you know, a 1,200 dollar repair quote.

RYAN

1:05:30 Okay.

JONATHAN

1:05:31 And then for your customer, they can, you know, request to change. So maybe we send the sober grand code only they need it down by broken down by line before they can approve it. They can just type that back to you. You can switch the format really quickly and send it to them as well as if they want to approve it. They click approve. Again, they can throw their po in there. So we don't have to Chase it on the back end... check that they agree to all your terms. And then they can actually click approve. So, you know, really easy, you know, for you all, to get the quote to them with a lot of information, but really easy for them to approve that quote and get it back to you letting, you know, to get that scheduled.

RYAN

1:06:13 Sweet.

JONATHAN

1:06:14 I know we're kinda pass time, but I've got time, if you will have some time, I only need maybe like five, five more minutes depending on.

RYAN

1:06:24 We're good.

JONATHAN

1:06:26 Okay.

RYAN

1:06:27 Got lots of questions.

JONATHAN

1:06:29 Yeah, no, it's fine. It's great. You know, what are you? I guess, how do you like, the quoting piece? You know, Ryan, I think you mentioned that you specifically do some quoting as well as following up on quotes.

RYAN

1:06:41 Right. No, it looks nice. It looks easy for a lot of the simple service stuff that we do. A lot of my quotes is, you know, batteries are due or hoes is due or, you know, a lot of that. I think I spend more time writing the customer's name and information and then I do the actual quote itself.

JONATHAN

1:07:02 Yeah. So at the end of the day, we're just trying to get those off of your desk and in front of your customer so, you can go back, to do on other things, that you need to do for the business.

RYAN

1:07:12 Right.

JONATHAN

1:07:15 I'll approve the quote from here. But basically your customer would approve it. It would kick you an e-mail let you know that a quote was approved so you could come and get it scheduled. Again. It would bring you to this page before I get into that as far as tracking quotes goes to. So you can click under quotes. There's a sub quotes menu and you can come in here. You can do like a ton of filters. But the two most important are going to be under quote status. So submitted and viewed that's gonna show you any quotes you've sent to your customers that they opened up, but they didn't approve nor click request change. They just opened them up and see they're still open and one of their 1,000,000 tabs or they closed it out, but they didn't respond to it or you can click submitted and not viewed that's. Going to give you visibility into quote that you sent to your customers. And for whatever reason, you know, they've yet to even look at it. So when you do go to follow up on these quotes, you have a pretty good idea of, you know, what's happened with them since you've you know, sent them to your customer, gotcha. And then you can just quickly, you know, re, e-mail them straight from here.

RYAN

1:08:20 Sweet.

JONATHAN

1:08:22 And then once the quotes approved, you'll get these two buttons, great job and quote allow you to create a whole new work order for the repair or add to existing job. So again, we're tracking your services. We're just going to pull up the trips you have upcoming at that same property. You can tag this repair onto a trip. You're already going to be making out there. That way, you're not trying to figure out when are we going to be out there next when, you know, when is the best opportunity to do this? So on and so forth, we're that information in front of you?

RYAN

1:08:52 Yeah, that's nice because, we do a lot of that where we send a quote out, you know, six months in advance and they say, yeah, just, save the labor. We'll do it while you're on site.

JONATHAN

1:09:02 Yeah, absolutely. Or, you know, if we send it out and we know we're not going to be out there for another six months, but they approve it. You know, we can pre schedule. We can just add that service to, you know, the inspection that we're going to be doing. You know, we can already get that on the work order. So, five months later, you know, it's there... Teresa. I think some of this, you know, touches your world, you know, what are your thoughts on? You know, kind of the way, we handle scheduling and, you know, just other miscellaneous organization and sending of reports.

RYAN

1:09:42 I think it looks good. I mean, it's very user friendly and I definitely like the idea that if, once it's approved, we can add it to the upcoming inspection. That's a... huge advantage for us, I think.

JONATHAN

1:09:55 Is it like a gonna be like a big time saver on your end? Or what's the biggest advantage you think?

RYAN

1:10:00 Well, just to make sure that we have the parts already when they go out in six months, because a lot of times you forget that, yeah, the customer approved this to be done when we're there next time you wanna make sure that it's actually ready and we have the parts required and they can do it when they're there.

JONATHAN

1:10:17 Yeah. So I just give you like, yeah, a lot of a lot of ability or flexibility to like pre plan?

RYAN

1:10:23 Right?

RYAN

1:10:23 Correct.

JONATHAN

1:10:25 Cool. Okay. Yeah. You know, the only other thing really, I do at this point is just kinda create the invoice. I know you are using Sage but you can still create the invoice and potentially Bill through service. So I don't know if that's something that's you know, of interest to you... but if it is, I'm more than happy to show it to you. If not that, you know, that's fine.

RYAN

1:10:46 Now, right now, we just want to create the invoice, and then we get over accounting because a lot of our bigger customers, they have their own like billing portals. So I'll be honest with you. Most of our billing goes through individual billing portals like we use Sage in house, but like we have to log in through like a Reba or whatever to, you know, send them specific bills and their on their stuff.

JONATHAN

1:11:08 Okay. So, are you creating those invoices in Sage?

RYAN

1:11:15 I think so.

JONATHAN

1:11:16 Okay. So you wouldn't want, I'm just making sure I understand you wouldn't want to create the invoice in service trade and upload them, to those portals, would you?

RYAN

1:11:28 No idea.

RYAN

1:11:29 That part, I don't...

RYAN

1:11:30 Know.

JONATHAN

1:11:32 Gotcha.

RYAN

1:11:33 That, that would be asking our accountant on that side. I mean, it's something you guys do, right? That, that's included in the package?

JONATHAN

1:11:39 Yeah. So absolutely, you can create an invoice. And all you do is you click complete job complete and create the invoice. This, this page pops up if you need to do any partial billing for any reason, but I'll just invoice it all. And then what happens is essentially, we create the invoice, you know, our inspection fee and we need to, you know, update it. And basically, you know, we'll create that invoice so you can click send invoice link and, you know, it's gonna look a lot like the quote as far as, your label, you can change, you know, if you include line items, things like that.

RYAN

1:12:15 Yep.

JONATHAN

1:12:16 And then you can, you know, you could just upload, I guess this invoice potentially, to their portal, if that would make sense or if it's faster.

--- Pricing ---

JONATHAN

1:12:25 And then, you can turn this pay now button off or you can allow them to pay this invoice through credit card or a CH, you know, again, that's optional if you want to include that or not.

RYAN

1:12:36 Okay. So.

JONATHAN

1:12:37 So, yeah, it's something that's included in ServiceTrade, you don't have to use it if you have a preferred method, but it's again.

RYAN

1:12:44 An invoices go to a bucket, right? That, that has been invoiced.

JONATHAN

1:12:49 Yeah, you can run. Yeah, you can run like a much like those that quote report that I kinda showed you. Yeah, you can just filter, you know, invoices the same way. Okay? But yeah, that, that's really?

RYAN

1:13:01 I've got...

JONATHAN

1:13:01 Kind of planned to show you Ryan, hopefully I showed you, some new stuff or it served as a good refresher.

RYAN

1:13:08 This looks cleaned up. I was with you guys when you early. So it looks, yeah, it looks.

JONATHAN

1:13:14 Yeah, I'm sure. A lot has changed then we've I know they've invested a ton in it. You know, I think kind of what you guys were looking for versus what server she can do. I felt like at the beginning we could deliver on. I still kinda feel that way after speaking with you all, but, you know, I always just kinda like to ask, I mean, what are your thoughts?

RYAN

1:13:39 I think it looks good. Like I said, we, so we'll need to sit down and discuss in house in general. I mean, what is setup look like? What's what's pricing? Obviously, your website shows pricing, what's is there any hidden stuff? Because, it just shows a monthly fee. Do you guys have like a setup fees and all that other fun stuff?

JONATHAN

1:14:01 Yeah, of course. So basically, what it looks like there, there is a setup fee on the front end for the first year. It includes 60 days worth of training and onboarding, just to teach everyone on how to use it, office personnel, as well as text. It will include us setting up your customer information, so, names addresses, contacts.

ZACHARY

1:14:21 And what do you guys?

RYAN

1:14:21 Do, what do you guys need for that? Like a CSV file? Or what do you guys need for that?

JONATHAN

1:14:26 CSV? The only thing we don't set up is just your services because it's just liability for us, of course.

RYAN

1:14:33 Right.

JONATHAN

1:14:34 Set up your items for you if you want us to. So we do all that on the front end, test it out and make sure everything's kinda linked correctly for the first year. It gets you access to, you know, five technician licenses in the field as well as unlimited office personnel log INS. So, this web based version first year, it's about 7,100 dollars, second year, it's going to be closer to 5,300. So there's about a 1,750 dollar lift on the first year.

RYAN

1:15:05 Okay. So, it's not per month?

JONATHAN

1:15:09 No.

ZACHARY

1:15:09 It's a, per technician?

JONATHAN

1:15:11 No, it's billed at one time annually.

RYAN

1:15:15 Okay. Just by however many technicians we have.

JONATHAN

1:15:18 Yeah. So, and then that base price gets you access like I said, to five. And then if you wanted to, if you hire people or you wanted to add more, you know, we just prorate those, that additional license or whatever. So if you're into the year, we would just charge for another, you know, six months.

RYAN

1:15:36 Okay.

JONATHAN

1:15:37 Does that, does that all sound fair or what are your, what are your general thoughts on that?

RYAN

1:15:41 Fair.

RYAN

1:15:42 I have a question for you. Jonathan sure thing. Why you over BuildOps?

JONATHAN

1:15:49 Why us over BuildOps? It's a great question. So, I think basically, you know, we've been around for 11 years working specifically with within the fire and safety industry can tell you for sure that BuildOps is just now dipping their toe into the fire protection industry as well as probably the most important thing that we're hearing now is that, you know, we've got that 60 day onboarding where we do the training. I know that they've got people so backed up over there that it's taking six, seven months to actually onboard and implement BuildOps. So beyond our experience, we're kinda realistic with the expectations, that we're setting with our customers.

RYAN

1:16:33 So, if we sign up, let's just say we sign up today, how long until we could get onboarded like, what's that process take?

JONATHAN

1:16:41 Let me check because basically, we do onboarding first and fifteenth of every month. So, like today, the soonest we've got available is gonna be November fifteenth to start. There's three slots available for that. Beyond that. It obviously moves to December first. So like 60 days from November fifteenth. So that's January fourteenth would be like your go live, of course, you have access to your service rate account over that time period. But that's it's just gonna overlap with us, you know, doing setting up your data and like doing the onboarding period itself.

RYAN

1:17:17 So, after that 60 months, if we wanna make any changes or like change our assets, what does that look like?

--- Pricing ends ---

JONATHAN

1:17:25 If you wanted, if you wanted to make any changes on like your assets?

RYAN

1:17:30 Or like, you know, with how the program works.

JONATHAN

1:17:34 So, if you wanted to, you know, edit your assets or you needed to add new assets, for new customer locations, that's functionality, you are going to have full control over again. Like if you wanted to request an additional asset field, you would kinda just funnel that through your account manager as a request. They would, you know, forward it along to our engineers in.

RYAN

1:17:58 Is there just one of charges for that? Okay?

JONATHAN

1:18:03 And then, yeah. So essentially, that, that's what that looks like. Did I, did I answer, the question or?

RYAN

1:18:11 Yeah. Okay. I just wanted to make sure that it wasn't like 60 days and up, and then you lose that support.

JONATHAN

1:18:19 No, no, no. So that 60 days is just gonna be essentially what happens beyond everything I've kinda already explained. Is there's one 30 minute meeting a week where, you know, somebody on your team who's gonna kinda be like just the point person would sit down with your onboarding specialist on our end just to make sure that we're answering any questions that anybody on your team has, and the transition and onboarding is going smoothly, after that 60 day period, you know, that kinda stops, but you do have ongoing customer support as well as, you know, an account manager which would serve as like your single point of contact through the totality of you being, you know, a service, straight customer.

RYAN

1:19:00 Okay.

JONATHAN

1:19:02 And...

RYAN

1:19:02 You guys have a parent company?

JONATHAN

1:19:05 We don't have a parent company? No, I mean, we have like investors, but, you know, we're standing one company.

RYAN

1:19:13 Okay.

RYAN

1:19:18 Jack, you have any other questions?

ZACHARY

1:19:21 Yes. When you were, when you were running the app and you were checking out of the, of an inspection... is there any way like, you basically, you had the, did you complete it? Yes or no? Are there any ways to add more gates or questions at that point?

JONATHAN

1:19:42 No. Is there anything specifically, you know, you would like, to see added at that point?

ZACHARY

1:19:50 Yeah. Maybe maybe like force a technician to maybe like, do you have any, do you have any comments? Do you have any notes? Are there any, is there any work that did not get finished that? I mean, I, it's the blanket easy question of yes, no. Did you finish? Could we have a couple of things where they kinda go through and say, yes, no, and then check out?

JONATHAN

1:20:13 Yeah. So unfortunately, you can't add like those gates a check out. We do have customers that have a similar workflow and, but essentially, it's just, excuse me, it's just a form that they include on the work order where from what they've told us, they'll just require before their technician actually clocks out of the job, that they kinda work through that. And it will just be kind of what you mentioned like, you know, a double check task list of like did you do a B and C? And it's just kind of a internal requirement that they have to do that before, you know, clocking out and leaving a job.

ZACHARY

1:20:50 Okay.

RYAN

1:20:51 And if they don't fill out an inspection report, will allow them to check out and say the job's done or is there a gate that they have to finish?

JONATHAN

1:20:59 Yeah. So, I mean, if, you know, if you do like the fill able PDFS, then, you know, we can't really safeguard that now, like our inspection manager piece that I mentioned earlier, you can make fields required to where, they can't you know, submit their inspection report and kinda, the most popular way to do that is just require that your technician actually signs off on the inspection before submitting it.

RYAN

1:21:28 Got you.

JONATHAN

1:21:32 So... yeah, I know you mentioned, you know, you guys are gonna probably have a discussion internally. You know, what makes the most sense as far as me, you know, following up with you like, is Friday afternoon fair or, you know, what's the timeline on your end?

--- *Next Steps* ---

RYAN

1:21:54 Who works on Friday afternoon?

JONATHAN

1:21:56 Well, not me, but, of next week. So I'll make an exception.

RYAN

1:22:07 How about this? We'll reach out to you Friday if we did make a decision by then, but why don't you when you're just off next week. So why don't you give us a call that following week?

JONATHAN

1:22:14 Networks, I'll you know.

RYAN

1:22:17 Yeah.

JONATHAN

1:22:19 With, with this recording and everything else. So you'll have my contact information, feel free to e-mail me at any point, but, you know, if I don't hear from you, on Friday with anything, I'll just plan on following up the, that Monday after. What, whatever that date is.

RYAN

1:22:34 Perfect.

JONATHAN

1:22:35 All right. Appreciate everybody's time. I'll also include like a formal quote with the pricing we discussed.

RYAN

1:22:41 Perfect.

RYAN

1:22:41 Sounds good. Thanks.

ZACHARY

1:22:44 Thank you too. Bye.

The End