GONG

ServiceTrade Demo with Consolidated Controls, Inc

Susan Warren with Consolidated Controls, Inc
Recorded on 4/27/23 via Zoom, 2 hour s 47 min.

Participants

SERVICETRADE

Susan Warren
Territory Manager

CONSOLIDATED CONTROLS, INC

Tom Cleary

OTHER

12016387173

Topics

Transcript

SUSAN

0:00 Good morning.

12016387173

0:02 Good morning.

SUSAN

0:04 How are you?

12016387173

0:06 Doing well. How are you, Susan? Good?

SUSAN

0:08 Good, love to put a face to the name. If you have a camera, if not no pressure.

12016387173

0:16 I do not have a camera.

SUSAN

0:19 All good. Well, thank you so much for joining me today. I appreciate you taking the time and I know we sent about 75 different automated reminders, but yeah, basically the game plan for today, if it sounds good to you, I wanna spend a good chunk of time learning more about your business, your goals, what you're hoping to achieve potentially with a tool like this.

--- Purchase decision ---

SUSAN

0:46 Of course, you know, tell you a little bit more about the folks that see the most value out of service trade. And I, know, you did take a look at the tool about a year ago, that kinda do that refresher. And then, you know, walkthrough some workflows, just have a conversation and you're liking what you're seeing, we can talk next steps. Does that sound good?

12016387173

1:06 Yeah. So I did a pretty exhaustive search last year for about two months. I looked at probably 20 or 30 different software service solutions of which narrowed them down, had some demos, whether it be something like a Zoom meeting or they're like, hey here's, a log in, have at it, you know... and service trade was one of the final contenders, when I was about to make a decision, so, I have pretty extensive notes on everything of there was actually two, I had two demos with you guys. I don't have a name written down on any of them, but I did go through, I didn't like.

SUSAN

2:07 I believe you're meeting with Aaron. He has actually moved on to a different company. So was kinda looking through his notes, looking at that conversation, but continue.

12016387173

2:19 Yeah. So I guess my first question in has been in a year because it looks like it's almost been a year to the day.

--- Purchase decision ends ---

12016387173

2:32 Has service trade changed anything that they do added new features change, you know, change the way things were done. I have, I'll kind of read you my total synopsis of when I made a decision here. Middle of the road, well planned software that steps up above most others get fall short with dollar extras for their service portal, fill able PDFS and an email only alert system using their generic customer quotes and service forms. Feels quote cheap. This customer service link per job order feature, keep their head above water along with assets, sub assets, patch creation of jobs for scheduling, mobile app, users need to use an external app to modify PDF forms and then remember to attach them to the work order for software.

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

12016387173

3:24 No tech acknowledgement upon completion of a job, we are struggling to stay afloat. That was my final thought if you will. Okay. Yeah.

SUSAN

3:37 Happy to touch on some of those things kinda briefly, you know, first off, you know, with the portal and just general, you know, communications via that service link, that is, you know, we have, I do know we have changed the layout of that to make that a little bit cleaner, a little bit easier when you send that service link, to follow along with actually just sent you the appointment... preview just ahead of this for, the job that we could potentially walkthrough today to give you an idea of what that would, of course, that would be, you know, much more robust after the service.

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

SUSAN

4:17 So in terms of look and feel that would be the same. So when it comes, I mean that would be a little bit updated when it comes to forms.

--- Forms ---

SUSAN

4:28 You know, we have options when it comes to that, you know, that fillable PDF if you're not a huge fan of that workflow. We have added on an additional product that's available for add on purchase called service forms. You know, that has, you know, the kind of conditional logic, things like that, you know, full transparency with that.

--- Forms ends ---

SUSAN

4:51 You know, there are a variety. I believe there's 13 different mechanical standard form kits that can come with that. However if, you know, in very small, you know, small tweaks can be made to those without incurring any additional fees. But, you know, given the fact, you know, obviously the nature of the business is not, you know, classic refrigeration or classic H back. My initial thought is that there would probably be a lot of customization that would have to happen from a software engineer on our team. And I'm not going to pretend that is going to be extremely inexpensive to accomplish. So that is an area to explore. You know, I'd be happy to, you know, service forms is an add on that we usually involve, you know, like, a sales engineer with the really do like a deep dive on. I can really send information about that, send over the standard form hits. But just in general, like, I will just be the first to admit to that. Does, you know, create, a cost increase with that, but that is an additional option to explore the other components that you mentioned, you know, in the core application reminders are still done through email.

--- Accounting integrations ---

SUSAN

6:13 We prioritize that just through the nature of, you know, us primarily serving commercial. However there are ways through integrations with a pier where SMS functionality is certainly possible. However that would be with a third party integration. So that would be in there, was there anything else that you touched on that was a key point for you?

--- Access to information ---

12016387173

6:40 So I pulled my paper notes as well. So you guys, so even though you have an app, right? A mobile app, that for the technicians now, is that... basically the just a mimic of what the desktop is. Is that a specific app that's developed for service trade as an interface?

SUSAN

7:05 Yes, that's a, you know, obviously there's a great deal of overlap in terms of the functionality and information. However, it is a completely separate standalone app that one would download from the app store for iOS or android, different functionality, different information, but designed to make sure everybody's got the information they need when they need.

--- Access to information ends ---

12016387173

7:28 So, so if I was to schedule a job, assign a technician or change a job, the technician does not get a push notification. He only an...

SUSAN

7:41 They only get an email if it's within eight. So we set it up. So it's they've an email is triggered. If the is added, I believe eight hours or less because generally most of the workflows or customers follow is, you know, either the end of the day or the beginning of, the following day. When they first go to wake up, they open up the app and see what's on their calendar. And then, you know, they, you know, get notifications via email if and when anything is added same day.

12016387173

8:15 Yeah. So that puzzles me. That's that's one of the, that really logically to me seems counter intuitive, where the phone they have.

--- Access to information ---

12016387173

8:27 The, this, we all have this wonderful device and I yell at my text often, like did you get a picture of it? Well, now, like how do I know what you're looking at? Right? So we have an app that has all this wonderful information on it. Yet when it changes, the phone doesn't tell you it changed.

--- Access to information ends ---

12016387173

8:44 You'd have to have your emails set up that it's that something changed. And currently, even though it's 2023 my technicians do not, we do not have company emails per employee. For the technicians. There's so little communication that they have with customers and that could be just unique to what we do.

--- Access to information ---

12016387173

9:10 But in the commercial world, most of my technician, you know, my technicians do not interface with the customer through emails and coordinate and anything like that. Everything is done at the office level. So for me to change the schedule and

assign technicians, and to give instructions to them through this app again seems counter intuitive when the apps not telling them, hey, you've been assigned a job.

--- Access to information ends ---

12016387173

9:34 Hey, they have to go and check their email or make sure that the notification of that email is, it is set up and I understand there's the whole zap or third party and it can send text notifications. But that's a whole nother level that doesn't need to be there. I just, it over complicates things, I feel, you know, going down that road, but we can, we don't need to stay on that.

SUSAN

9:56 That's really fair. Yeah, you know? Yeah. So, we talked about that and.

12016387173

10:03 I... was gonna say, do you have other, you know, has that been brought up before, from current customers or other customers? Like like if you don't wanna do text. Okay, I get that there's probably some fees you have to pay to the carriers to send a text over their networks or have it developed, but a push notification on an app. I mean, these free games and these developers, they do it.

--- Access to information ---

12016387173

10:29 You have you're paying for an app anyway for apple and android already. Just add the push notification program in there and away you go.

SUSAN

10:37 Yeah, I know, that, that's been brought up. I'm not sure... if that is on the road map for this year, but I do know that I am not the only one that has, you know, mentioned that because I've heard that before, but yeah, kind of moving past that.

--- Access to information ends ---

SUSAN

10:58 I guess I was looking through some other notes and, you know, kinda generally, we do try to optimize, you know, the way that things are laid out, you know, but in terms of customization, you know, I know that was kind of a concern for last time, you know, there isn't for example, ways to like reorganize, you know, for example, like, you know, having certain sections be at the top, certain sections be at the bottom for quotes for invoices, you know, they just wanna, you know, go ahead and, put that out there.

--- ST app contracts and pricing ---

SUSAN

11:30 But in terms of additional functionality that we've added, we've put a lot of focus as well on, you know, for folks that are doing kind of shorter term non GC managed installations and projects. So we now have budget management feature where, you know, for those install jobs, you can create budgets, do change orders.

--- ST app contracts and pricing ends ---

SUSAN

11:57 So all of that would be able to be managed in the app as well. That's a place where we've put a lot of functionality kind of behind and then just kind of making sure that things are laid out in appropriate ways. And I do know that on the road map for later on this year, we're gonna continue to put a lot of push behind scheduling and dispatching in terms of the user experience of those boards from the offices perspective. But I am curious though, you know, I know we kinda briefly talked about your experience with BuildOps, right? You know, just kind of generally the sense of over promising under delivering. Were there particular areas that we're you know, kinda gotta have for you where they promised them... necessarily deliver on those promises of.

12016387173

12:54 Yeah.

12016387173

13:00 It's it's tough to figure out where to even start and to try to summarize, you know, it's funny. I just wrote a Capterra review the other day on BuildOps even though it's been almost a year, since I told them enough is enough... you know, without spending too much time on, it was sold to me as this kind of customizable solution which, I thought that should work best for me, right? Because I can't find, I have this box that I'm trying to fill with a software solution. I know it's not going to be like for like the way my workflow is and what I do and all this, you know, the just overall comparing all the softwares. A lot of time. I found softwares that were geared more towards like residential like commercial. So you've got the please take, you know, at the end of the job, I have to now scroll through three screens to create an invoice. Take a payment, customer sign off like, no, no, get rid of those screens.

--- Tech On-site ---

12016387173

14:06 Well, we can't okay, good bye. I don't do that. You know, my technicians are technicians period. That is all they do. They do not collect, they do not collect money. They don't charge customers. They don't write quotes, they don't look up parts, they don't they go on, they go to, they go to a job, they perform technician duties, they write it up customer signs and they leave, that is their only job efficient straight to the point.

--- Quote templates ---

12016387173

14:32 No, nothing else. And trying all these other systems have all this other stuff built in and I'm like, well, can that be disabled? No, it can't you have to, I don't need. I don't need a parts quote. We don't need to make a quote on a deficiency. We want, not a deficiency moving on that's it.

--- Assets ---

12016387173

14:48 I go to sites. I had a guy on a site three days last week, looked at 32 pieces of equipment and we have almost 20 pieces of equipment that need to, we need to go back to look at. So I have 20 deficiencies. He would have some of these softwares.

--- Assets ends ---

12016387173

15:03 I would have had to create a parts quote and an invoice for 20 of them. It's absolutely ridiculous. But anyway, so BuildOps told me this, we can give you what you're asking for. No problem. That was a complete and utter lie. They, their customization, what they define as customization is really you entering the data that you want versus the data that's required. I found that there was... duplication in a lot of the workflow and processes and... it didn't I really had trouble trying to understand their workflow. I said to myself. I got to a point. I said, all right, I'm gonna just ignore what I do. Let's figure out how the BuildOps workflow works. And I couldn't figure it out because you have to, you would dive down through, menu. And then you'd have to back all the way out to the top and go somewhere else in the software and go, menu. So it didn't flow, you know, think about when you're on a web page because that's how we're that's what we're used to, right? I, and it doesn't matter. Most software is now designed especially if you're using it on a web page. You click here, you click there, you click there, you click here. It, they didn't have that. So when you entered into menus, you get three or four levels down, you can't go anywhere else. You have to back out of that menu system, right? That was, that was something that absolutely blew my mind. The other problem, one of the bigger problems I had is that 50 percent of my business is to equipment manufacturers in my territory... and, the sites that fall under them are equal is about 200 sites per customer. And these are buildings in New York City, New Jersey, Connecticut. What happens in this market is the buildings get sold. So they're new owners or my, one of my generator guys, he loses the contract and the other guy picks it up. So it's the same building and they both use me.

--- Assets ---

12016387173

17:28 And I go back in BuildOps, you created a customer and then you could create sub accounts for that customer. That customer was essentially just an address. There was no history. There was no parts. There was no, you could invoice that customer. There was no service history. The service history was on the sub accounts of that customer.

--- Accounting ---

17:53 So I said, well, I have an address, let's call it 123 main street. It's currently with my caterpillar manufacturer. They lose the contract. And next year it's going to be with my Detroit deasal manufacturer. I can't move that over that sub account over to Detroit deasal.

--- *Accounting ends* ---

18:18 It's stuck in it in caterpillar. So in order for me to... have an account, I need to create a new account and guess what they don't talk to each other. So I could be going to a site for 10 years, have all. This wonderful history. But if the building gets sold and goes under new ownership, I lose it all. And then, so then I have to create a new customer with the new sub account for the same building I've already been working in for 10 years. And then I have to somehow some way make notes so that I know to look up what the old one was. Well, if I put them another 10 years, I'm not gonna remember what the hell the name of that other company was 10 years and why do I need to keep a record of someone from 10 years ago that I don't do business with anymore? It really boggled my mind and then... the information of that kind of main customer and sub account, you were limited to what you could or couldn't put in like, yeah, I couldn't I forget what it was.

--- *Accounting* ---

19:23 There was this like as in reporting, I said, okay, I'm I created a whole bunch of customers and sub accounts and I created a report but you couldn't like you could only there there were only, you know, this customization, right? Well, customize report. I want to get information data that's what this is all about data. The report would only give me certain options on either the customer level or the sub account level, but not both. And there were options of one and not the other. And I'm like that makes no sense.

--- *Accounting ends* ---

20:00 Why would you do that? Why can't I have a report that gives me all this from a to Z for either a customer or a sub account or all the sub accounts. Why does it have to be one... that was a, that was a big turn off when that came in because, my customers change so much. I might go to the same. I might, I have buildings that we've been going to for 30 years. They've probably some of them have probably had four or five different owners. That was, that was a big one that I had that a lot of trouble getting over the hurdle.

--- *Quote templates* ---

20:41 And then there was no global quote template. So, you know, I have kind of a quote template that I use for everything. Like I literally have maybe two quote

templates total that I can quote 99 percent of my work with and that doesn't exist in BuildOps. I literally every customer gets their own quote. So I would have had to recreate my quote that I wanted. And I'm like, how is this not a thing? How is it? How, how do you not have a global quote template?

SUSAN

21:18 That's super weird. They have templates for, the services on work orders or did you have to retype that in every single time?

12016387173

21:27 Right. Well, so, essentially, the global quote template was theirs and I couldn't change it?

SUSAN

21:34 Okay.

12016387173

21:34 If I wanted, if I wanted a custom quote, I had to make one, but it was only, it was on a per customer level.

SUSAN

21:44 A global.

12016387173

21:45 Global, yeah, I was like...

SUSAN

21:47 That's nothing.

--- *Quote templates ends* ---

12016387173

21:48 That's so, what ended up happening with all this? We've been talking almost 20 minutes. I talk a lot sometimes and talk in circles.

SUSAN

21:58 You're...

12016387173

21:59 You're...

SUSAN

22:02 Good.

22:04 So, essentially, the guy I got to the implementation expert, he was fresh. He's only been with the company like a year and a half, two years. Nice guy, but he didn't know this. We struggled back and forth so many times. There was a point where, like, how come I can't apply labor? How come I can't make a quote? And, you know, I'm trying to use this system that you've given me where he had to go to management.

--- *Tech time tracking* ---

12016387173

22:31 And like, yeah, you need to go into. So that was another thing I'm like, well, wait a minute. I can't enter my own labor rates. You have to enter them. I thought this is my system. So every so every year that I wanna make that, I want to change my labor because I do, I have to call up BuildOps and say, hey, I need you guys to log into my system and change my labor rates.

--- *Tech time tracking ends* ---

SUSAN

22:53 That is insane. I mean, everything else you were telling me like, it's gotten like it first. I was like, okay, I kinda see where they're coming from and it's getting progressively worse with each thing.

12016387173

23:03 Yeah, you know, so we couldn't we, you know, and... they were, you know, I told him a few times like, you know, you're doing the best you can, but we need more because, you know, I'm starting to get frustrated here.

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

12016387173

23:21 We're not moving forward anymore. You know, we're moving backwards every time we talk, I'm not going, you know, and he's like let's implement in two weeks. I'm like not a chance, not a chance. This is not happening. I am, not, I'm not implementing the system yet. And, the, they were gonna sign, you know, they assign us after your implementation. You get a, you get a person that's your person, project coordinator, whatever you wanna call them customer. So, you know, my service person and I think she showed up two of the, so, so I dealt with him two to three times a week. I think she showed up for two or three of the phone calls that we had.

--- *Paper process* ---

12016387173

24:06 That was it. And I'm like you're not getting help. And I said, you know, this isn't working. We're running. I'm running constantly running into obstacles. We're constantly trying to come up with workarounds. I said what's the point of all these workarounds when you have this, all the system.

12016387173

24:21 So... I believe that the BuildOps software was created for a specific customer, probably a manufacturer, a very large manufacturer, and a manufacturer that has a service organization. So, you call up general electric and say, I've got a problem with my refrigerator and I need somebody to come and look at it.

--- Type of work ---

12016387173

24:50 And they say, yes, sir. Sure. No problem. And, you know, they call the local dispatch center, the local distributor, whatever it is. That seems like how that system works. That was made for someone. And my guess is they didn't sell it. And so they said, well, I think we can sell it to service small service companies. And that's how they marketed it and it's because it's not that old. They've I haven't been in business?

SUSAN

25:16 No, yeah.

SUSAN

25:18 You feel like...

12016387173

25:18 It's...

SUSAN

25:19 More geared to folks that are.

SUSAN

25:20 Doing more reactive service as opposed to proactive service. Is, is that the impression you're getting?

12016387173

25:27 It's it's constructed in a way, it's very much... like a... top down management where there's multiple...

12016387173

25:46 Where you could have a let's call it a New Jersey service repair center. And then underneath of them, you could have every household that calls up and it would work. That system would just, you know, butter on a hot Pan. It would just work and that's what. I believe it was. It was designed, for a manufacturer that deals with end users, you know.

--- Type of work ends ---

26:19 And so you've got all those levels in between... and, it probably works well. But for what we do, it's person a, in person B and see you later. So it doesn't work. It's you know, and, think about the manufacturer and user that end user calls up once and you probably never see them again.

--- Type of work ---

26:45 I mean, what do you think the return is on somebody calling back about the refrigerator being broken within the first three years, right?

SUSAN

26:51 I see what you're I see what you're saying. It's like it's more. I feel like it's geared towards like one and done instead of like long term developing relationships like growing back. Okay. Gotcha. That makes sense.

--- Type of work ends ---

27:06 Right. You know, we are, I'm not a manufacturer. We don't make anything. I barely even sell parts for that matter. I sell labor hours year in and year out. I go to custom. You know, I have a customer for 33. I have the same address for 33 years, maintaining the same piece of equipment. And I've had people say how is that even possible equipment dies after 33 years? Go you're right? It absolutely does die after 33 years. So, this is a piece of infrastructure in the building. The electrical infrastructure of the building is this automatic transfer switch that sits there. It's connected to the generator on one side, and con edison on the other, I said when it was put in when the building was built and it'll be ripped out when they knock it down.

SUSAN

27:58 Very committed relationship with that building. So, I mean, I'm getting the impression that you guys are doing a lot of more planned work than reactive work. Would, would that be the case?

--- Pricing ---

28:11 Well, well, no, because when there's an outage and the transfer switch doesn't transfer, hey, Tom, send one of your guys over. I didn't transfer. So, yes, there is absolutely emergency calls.

SUSAN

28:26 Yeah.

28:27 We're we're a service organization. So we're open 24 seven, 365 days a year because so are my buildings... all these high rise buildings in New York City, you can't just shut the building down for the weekend and walk away.

12016387173

28:45 There's all these systems that need to continue, you know, the water needs to flow, the heat, you know, even in summer, there's buildings that still need to keep the heat on because they're so big, they don't their conditioning, they use heat all year. There's spaces in buildings that use air conditioning all year. You know, all these systems need to continue operating even when the building is what we call unoccupied... high rise office buildings in New York City generally don't have many people in them on a Saturday... right? Most people can't work on Saturdays and Sundays.

--- Type of work ---

12016387173

29:21 So, you might have Monday through Friday, 50, 60,000 people walking through your doors every day. And on Saturday, you've got 100.

SUSAN

29:34 Those people still need to, you know, exist in a comfortable space, so.

12016387173

29:39 Right, right.

SUSAN

29:40 But just to be clear, I mean, obviously, you know, reactive work is always going to be part of it just to kinda clarify, do you do a significant amount of planned maintenance agreements? Like if you had to break down the percentage of service like proactive versus reactive jobs? Like what percentage would you give to proactive?

12016387173

29:58 That's our, that's our core. That's our core business, is the maintenance of the, you know, 400 odd customers. I have probably a contract with at least 375 of them.

--- Type of work ends ---

12016387173

30:13 And that's and that's a, that's also the reason why we do business with only 400, is that I don't I won't do business with anybody. I get to pick who I wanna do business with. I wanna make sure that if I'm gonna do business with someone, I'm gonna keep going back. No. So... I don't know if you've ever tried to get, your, you

know, your heater air conditioner fixed in the middle of summer. The first question they usually ask is, do you have a contract with us?

SUSAN

30:46 Yep. If not, do you have a friend you can stay with?

12016387173

30:52 That's right? So we do the same thing. You have a contract with us. Okay? Let me send you a quote for that, and then maybe we can come out for emergency service in a day or two. I do, I follow that guideline. So, yes, and their renewals, year in and year out. You know, I use the 30 year example obviously... that's the core that's the core business.

SUSAN

31:23 So, ever since, you know, kinda cutting ties, with BuildOps, I know you mentioned you're going back to, you know, free tools, pen and paper. Have you, have you checked out anything else since, or am I the kind of, the first person to kind of reach back out and reopen things for you? Almost? I almost feels like reopening old wounds but not.

--- Accounting integrations ---

12016387173

31:46 Yes.

SUSAN

31:47 There?

12016387173

31:47 Who was that? There was a guy?

12016387173

31:56 I think that I don't know if that was raiser?

SUSAN

32:00 Raisers, sync.

12016387173

32:00 Raiser sync or there was someone else. So they have a demo, you can like go online. He, he called me. We had a nice little chat and I was like, I got some time.

--- Invoicing ---

12016387173

32:14 I'll take a look. He's like, you know, the demo is free, log in and I go to log in and it's like, well, just give us your credit card. I said, well, that's not free then like, you know, we won't charge you. Well, then what do you need my credit card for you're? Not?

--- Paper process ---

SUSAN

32:29 Is this like, is this HP max like this? Or is this like is field service software? Like what's happening here?

12016387173

32:38 Is wild a deli? Yeah. So I told them that I haven't heard back. And, I looked at a couple of other things because... the original thought was to try to communicate better with my technicians, spend a fair amount of time scheduling and assigning the schedule and creating the paperwork, the dispatch paperwork to get the text out and about. And then the second thing I spend a lot of my time in is all the paperwork they bring back after a service appointment. And so I looked at that first because that I spend more time on then they'll actually scheduling and dispatch and all that I looked at trying to digitize 100 percent what we do.

--- Paper process ends ---

12016387173

33:34 So currently, the way a typical site visit would occur or maintenance, whatever you wanna call it is the customer, would, you know, I would send them a quote, we would schedule it when, the week of the appointment, I create a schedule call sheet which is in word. I print that out with all the pertinent info.

--- Assets ---

12016387173

34:04 If we've been to the site before, there's generally a service report that has all the equipment on it. Every piece of equipment gets one old page. Though if the site has 10 transfer switches, it's a 10 minimum of a 10 page report plus a table of contents. Blah blah blah.

--- Paper process ---

12016387173

34:22 So I print that out with the service call, all sheet. So they're gonna walk on site with call it 15 pieces of paper. They go through the site. They touch every transfer switch, they mark up all those sheets. They then take another piece of paper, number 16 sign off sheet. They write what they did to all those pieces of equipment during the day, have the customer sign off on it to part. So two partner, so the customer gets a copy. We take a copy back with us. They drop that, those 16 pieces of paper off in the office.

12016387173

34:54 I pick them up. I scan the sign off sheet with the customer signature, and all the handwritten notes from my technician. I take the report that was marked up. I open the word document, rename it for the current year, make all the changes, save it as a PDF, send it off to the customer. That is workflow in a nutshell.

--- Forms ends ---

SUSAN

35:16 Got it. So other than just the time that that's taking you with the lack of automation, you know, what are kind of, the big picture implications, to the bottom line of the business of doing things that way instead of having, you know, the, a suitable field service management tool that would automate some of these processes.

--- Paper process ---

12016387173

35:40 We're a small company. I have four technicians, a bookkeeper, an engineer and myself. So guess who does the service reports and, guess who finds new business?

12016387173

36:00 Rate quotes, yup, guess who vacuums before?

SUSAN

36:05 I...

12016387173

36:07 Wear a lot of match it's...

SUSAN

36:10 Yeah. And that, and that sounds, you know, exhausting.

--- Customer engagement ---

SUSAN

36:14 But like part of me also wonders about, you know, okay, if we could automate some of this stuff, what, you know, potentially revenue generating things could you be doing with your time? You know, I know you want to be selective about the folks that you're working with, but, you know, could you, could those that time be spent, you know, having phone calls with, you know, your customers, developing those relationships, you know, doing training with your technicians.

--- Customer engagement ends ---

SUSAN

36:40 Like I'm just, I'm a Peter of things that are a better use of your time and I'm sure that it, you know, everything that you've put together is, you know, because it sounds like you're a methodical kind of guys, the AB that I'm getting, but, you know, like just knowing that you have to take the time to create that and it's all kinds of in these like kind of free tools. They don't have that necessarily like, you know, two way communication to them. Just, it sounds exhausting, for you and everybody involved. But, and very quick thing in terms of accounting, are you guys, is it Quickbooks or something else?

12016387173

37:23 All quick?

SUSAN

37:24 It looks very good. Well, I mean... in terms of, you know, let's say like, I mean let's see 100 percent real with one another.

--- Purchase decision ---

SUSAN

37:37 Service trade is not the perfect software because one does not exist to some of the concerns that you brought up, you know, like you mentioned the, you know, that the push notification is not there yet. There, there are some features that I'm sure in a perfect world, you won't that frankly, we do not have at the moment, however, you know, if we kind of walkthrough this and you felt like for lack of a more positive way of phrasing this, you know, if you felt like this was potentially after your search kinda the least terrible option of all the options that are out there? Is this something that you feel like you'd be open to moving forward with sometime soon or do you wanna kinda reopen the search again and kinda go through the another 20 folks, to demo with or where are you at in terms of thinking about timing?

12016387173

38:26 So, yeah, I kinda got off track a little bit.

--- Accounting ---

12016387173

38:29 I started looking at and not very fluidly but I started kind of looking at database type software... stuff where it's just, you know. So right now, my customer files reside as Dropbox folders, right? Everything is essentially either is a word document, an excel spreadsheet or a PDF, that is my customer list.

--- Accounting integrations ---

12016387173

39:00 So, one of the issues even if we go down this road with you that we did with BuildOps is when we suck the data out of Quickbooks. That's only half of my

customers. The other 50 percent I have to manually enter in... because, it's not in Quickbooks. Right?

12016387173

39:26 I told you I have, 50 percent of my business is with two customers. Well, I've got 200 sites under them. And so all those sites are named customer a and customer B, right? I mean, we use it's in Dropbox as an address, but I know it belongs to them because I have a little note there that says this is a, this is an add a and this is an H open.

--- Paper process ---

12016387173

39:48 But in Quickbooks, the customer, the end user is not getting billed, customer a and B is getting billed. So so that's the thing. So a database to get rid of my service reports and the paperwork, the physical paper that I have, I've been looking at like what a news organization might use, like a newspaper might use, where people write stuff and put together and teams work together to do paperwork. There's some crazy, my God, crazy software out there. Let me tell you.

SUSAN

40:21 Yeah. And there's more and more every day and like, I, you know, a lot of folks I talked to, it feels like, you know, it's hard to leave the buffet because they're always bringing out new stuff. And by the end of the day, you're like wait, I'm still hungry but I can't make choice because they keep bringing more things to the buffet and you're like, Dang it, I'm getting hungry and hungry. I need to just make a choice but, you know, I definitely get that.

12016387173

40:48 So, I don't really know. I don't really know, where I am with this. I'd be willing to kind of run through the software another, you know, in a start to finish with, you know, the scheduling just to kind of visually see it again, and just, you know, to kinda hit some of the weak points that I wrote down. And just see how, you know, now having gone through that kind of the BuildOps thing, and all that, you know, when I go back through, okay. Yeah, this is why I didn't like this or, you know, what that might actually work? I think I could use that, you know?

SUSAN

41:26 Yeah, yeah.

12016387173

41:29 That's where I think going.

SUSAN

41:32 I say let's do it. You know, I've got a sample job pulled up for us to kinda work through today in, you know, I say, you know, just kinda quickly, let's go through and we'll have a conversation. So, let me go ahead and let's see.

12016387173

41:48 How long do you have appointment there?

SUSAN

41:52 I do not have anything until two.

12016387173

41:58 Okay. Let's we're done before then.

SUSAN

42:00 I was gonna say.

12016387173

42:01 Not that I'm not that I'm enjoying our time together.

SUSAN

42:04 You're a, no, yeah. If you had a hard stop at 12 30, like let's reschedule.

--- Access to information ---

SUSAN

42:10 Okay, perfect. But yeah, let's just jump right in and we'll talk through things and you can bring up concerns. Well, I mean, sometimes there's going to be workaround. We'll talk about what they're Tenable. And we'll talk about it. So let's go ahead and I'll share my screen here and then let me go ahead and join from my phone, so we can talk about the mobile perspective. So.

SUSAN

42:39 Yeah, yeah.

12016387173

42:40 I like see that too. So.

SUSAN

42:44 Absolutely. Okay. The thing that drives me crazy about Zoom is that there's always a lag from what I'm actually seeing on my mobile device to what's like being displayed on the screen. And I feel like it makes this look bad. I'm like, no, the lag is not coming from service trade Romas. Okay. So, let...

12016387173

43:03 Yeah, yeah. It's like two or three seconds and... Jazz me great.

SUSAN

43:12 Once again, no such thing as perfect software. Okay? To... over here and go ahead and... share my screen.

SUSAN

43:40 Okay. I apologize that Zoom is acting out. Let me leave with my phone... and then rejoin.

SUSAN

44:36 Going to kill this task.

SUSAN

45:05 Okay. It's finally working. Okay, right? So joined in there... and just a second, you should see the office view. So hopefully this strikes your memory from last time, but this is a job and service trade. Okay, a work order. And, and again, we are, you know, we have it done similarly to build ups, not gonna live there about the way that we have things organized but the way that you're describing things.

--- Recurring maintenance ---

SUSAN

45:43 But just because you know, the company can change and would need to shift over to a different company again like build ups, we don't have the ability to say, hey, let's take all these locations. And you mean you can change the name of the company, I could go in here and change this company name instead of crispy cream headquarters to say, you know, Duncan donuts headquarters, but that's not gonna, if there's an existing dunkin donuts company, it's not going to shift everything over.

--- Recurring maintenance ends ---

SUSAN

46:10 So, in light of that, what I would recommend is, you know, it would be, you know, and we can help with this in terms of the bulk upload initially, but I would recommend doing everything, you know, having everything organized such that, the company name and the location name that they're... at least we have similar information within... a, and you can just put in parentheses and the location, you know, what that particular, you know, the company that is involved in that. And so if that switches, then you can change that and then you have search by those terms. But as I mentioned, you can't take a location and transfer it from one company to another. So I do wanna just let you know about that, but.

12016387173

46:57 Generally, so.

47:03 I believe with BuildOps. Once I put that company and that name in, I could not change the company name.

SUSAN

47:11 It...

47:12 Was kinda, it was stuck there forever. So like you said, well, I can change it to Duncan donuts. Right? So now, the, so the question then comes in, and this is where this is where the like, well, why is that right? So you have a company and you have a job location? If I was to create an invoice, can I choose either one or both... the invoice?

SUSAN

47:39 So, yeah. So like let me show you a sample invoice really quickly. So that would be under here.

--- Recurring maintenance ---

SUSAN

47:58 Go up here invoices.

SUSAN

48:06 Click on this.

SUSAN

48:12 And now, I want to the invoice?

SUSAN

48:21 So, yeah. So it's gonna have, the Bill to and the location on there. So the Bill to, is that corporate headquarters that's going to be the company information and the service location is gonna be on there as well. It's always going to be on there.

12016387173

48:37 So, let's say that location in night Dale becomes a Duncan donuts and I move that night Dale location to the Duncan doughnuts company.

SUSAN

48:50 Yeah... that's why I'm thinking it would be best to basically have, it would almost be like the way that we tell folks to do it when they have a handful of residential. So, like, for example, you know, you wanted to go in and say, okay, let's

say there's a brand new customer. So you would go to company, create a new company. And basically, you would key in whatever that company name is. So, like, for example, give me an example of like, a bigger company that you serve.

12016387173

49:29 I... can tally. One of my oems is H open HOPEN?

SUSAN

49:41 Okay.

12016387173

49:46 Okay. So they, so they send us, they get service contracts and they hire us to go out to various addresses all over the metropolitan area, right? So each one of those locations has its own equipment, its own contact, its own, everything not related to H open because they are essentially a service provider. They're a vendor, of that location. So, my issue is how do, I wanna be able, to keep track of that location? But I need to know it's owned essentially and the contract is under H open.

SUSAN

50:37 Gotcha. This is what I would recommend doing. So I'm gonna take all this out and just gonna use kind of a random example.

--- Recurring maintenance ends ---

SUSAN

50:44 So, yeah, let's say, you know, you've got, that situation and, you know, that one day Ho, pin... moved this location to acme. So I'm gonna call this building... and let's say currently at me is managing that... and I'm just gonna grab a random address. I'll change that name up there. Yeah, like I said.

--- Recurring maintenance ---

SUSAN

51:27 Right. So, so that's the actual location that it's currently being managed by, right? We'll remember that right there. Click save.

SUSAN

51:46 So in your case, because the ownership could change, basically what I would do is I would then make a single location underneath this.

12016387173

51:59 Well, the location doesn't change, the owner changes. And so when I invoice it, the invoice needs to get sent to act me.

--- Recurring maintenance ends ---

SUSAN

52:12 Okay. Gotcha. All right. So.

12016387173

52:15 That it would still be said it a little bit clearer.

SUSAN

52:17 Okay. So the invoice and would that be a different address? Correct? Okay. So, yeah. So for, you know, let's say that what we just keyed in there was for acme corporate. And so basically, you would still put in the...

--- Recurring maintenance ---

12016387173

52:38 This one a different address.

SUSAN

52:41 Yeah.

SUSAN

52:45 But then you still want to know that this location just in case like right now it's being managed by acme, you could put that in there as well. It's still going to be nested under that. But because I'm thinking you need a company and a location for each actual location.

--- Recurring maintenance ends ---

SUSAN

53:04 Because if the tall building falls out of acne, and then goes to being managed by Johnson, then there's no way to take this location and transfer it over to the Johnson company.

12016387173

53:18 But I can change all the company info. So, yeah, currently under acme with, at four 30 to park a, we can go into the company name, change it to T and T corp at 123 main street, right?

SUSAN

53:34 Exactly. Yeah, you can, all the fields are always going to be applicable. Okay, that perfect.

12016387173

53:40 Yeah, that was. So, so the company name and BuildOps once you put it in it's locked.

SUSAN

53:47 Okay. That would be annoying.

12016387173

53:50 Yeah. And I was like, I can't how do we do this? How do I do this? And you had to create? And I'm sure you guys are the same. You have to create a company and you have to create a location. So, I was like, you know, duplicating everything I do now.

SUSAN

54:09 Yeah... for me and this to be clear.

--- *Accounting integrations* ---

SUSAN

54:16 So... do they currently like live in, a list that, I know you mentioned the Dropbox piece, but like would it be feasible to get that information into a spreadsheet?

12016387173

54:33 So, because Dropbox and the cloud are wonderful things, I could probably send you my excel, the excel dump that BuildOps pulled out of Quickbooks, that's...

--- *Accounting* ---

SUSAN

54:45 Cause...

12016387173

54:46 Giant list?

SUSAN

54:48 The initial is like during onboarding like the big lift, we're getting all that initial information in there, then as things change, you know, like kind a one off that way, it's not this giant job for you or you're trapped in data entry, hell, you know, we're you know, using even excel formulas like clean things up and all that.

--- *Accounting ends* ---

SUSAN

55:11 So that, that's a very amount of thing. But anyway, so in summary, yes, we can make those changes, but going back to the work order?

SUSAN

55:30 I live in a very rural part of North Carolina. So our internet service provider options are not always that great. So I just know that things will be fast. You have actual like access to five internet fiber internet, but I get to have chickens and geese and, you know, walk around outside.

--- Recurring maintenance ---

SUSAN

55:47 So it's good. But yeah. So, so, you know, we talked about all of that upfront you, the way the information is organized. But yeah, it's it is organized. You perform work on assets that live at locations that are part of a company. So in this case, we've got a list of preventative maintenance items that we need to complete at this appointment.

--- Assets ---

SUSAN

56:09 And that is going to be done on the rooftop unit here. Of course, you know, we have a variety of, you know, kind of big picture asset, you know, titles that you can choose from. And then you can always, you know, while the icon won't be a perfect match to it, you can certainly always key in any asset that you have and put in all the information about it down here.

--- Quote templates ---

SUSAN

56:35 This is something I was asking about with the templates because we don't just have quote templates. We also have templates for the actual services that are expected to be performed. So this, you know, if this is something that you're doing frequently for a variety of different customers, of course, it's going to be global. You would want to apply this template. So you don't have to retype all of this. And of course, you can make small tweaks to it however you like. And that's gonna come with the commonly used parts and labor down here. Again, you can make those tweaks as well.

--- Recurring maintenance ---

SUSAN

57:05 This is a plan maintenance job. So this as you can see, this was set up so that it repeats quarterly. So this, we have told the system that this needs to be performed at some point in the month of April. And then we went ahead and selected this time for it. And then the system is designed to prompt us to recreate that appointment, for this work. Again in July. After this is done... this is has the it.

12016387173

57:34 To... how does the system prompt you?

SUSAN

57:42 Good question. That is done through our servicing opportunities board. So basically, what most of our customers do is like once a month or however often you like you head over here to service opportunities and let's say we wanna see everything that is coming up this month... for all our services. And this is going to be everything that is an opportunity, something that would be due this month. So you can go through check one all however many you like. And then you're just going to select the type of job that these would be. So let's say they're all plan maintenance... and it's already set up to default to the preferred technician that you've keyed in for that.

SUSAN

58:32 Of course, you can make those adjustments individually later on and it's set to all of these defaults. And so you can click through.

12016387173

58:38 No technician... you saw there's no technician.

SUSAN

58:48 On all office, so on over.

SUSAN

58:57 I want to check that. No one has I'm going to be fully transparent and say, I have not been asked that before and I'm gonna find, let's click this button and see what happens when I create this job.

12016387173

59:09 That was another issue I had with BuildOps was that in order to put a appointment on the calendar on the schedule, you have to assign a technician. And I said my customers call me in January and say, Tom, I need an appointment for March. I need an appointment for July, I need an appointment for September and I need moving for December. I'm supposed to assign a technician. So all four of those even though one of them is 11 months away, I said, and that makes sense to you. You do not have, you do not have to.

SUSAN

59:48 I'm just gonna stop right there, no.

12016387173

59:50 Do.

SUSAN

59:51 Not have.

SUSAN

59:51 As you see... I mean, I'm here for BuildOps... of course, but, yeah. So, this generated, this job and you see there's no technician assigned. And so, you know, you can go there directly and schedule it. But then when you go back to our main screen and there's a bunch of other stuff on here that we can certainly touch on. But once that's done, you go through, you generate, you say, hey, I wanna generate all these jobs and, you know, let's say it's in this case, it's let's do at some point in the month of April, they would live here because it's jobs without appointments they're do in the next two weeks that's when it's like, okay, I actually need to go through, put this on the schedule, assign a technician. If you would just want to generate that job, you know, coming up that's how, you would do that. And then when you...

12016387173

1:00:55 You...

SUSAN

1:00:56 So...

12016387173

1:00:57 The workflow, hold on. So the workflow is you create an appointment and that is just kind of a, I just kinda sit here in limbo.

--- Recurring maintenance ---

12016387173

1:01:07 I then make that a job and that's where you assign the technician, but the appointment can be on, this is still on the calendar as well, correct?

SUSAN

1:01:16 Kind of vice versa. So once a month, you generate all your jobs and that just that is basically just means that like here's the list of services to be performed on these assets or assets and it is due at some point for example, in the month of April, you generate all those jobs, right?

--- Recurring maintenance ends ---

SUSAN

1:01:35 And then when it's time, you're getting closer to it, you know, you're a couple of weeks out for example, when it's time to actually schedule those jobs, those would live there. But in terms of actually scheduling it, you'd wanna utilize our map based scheduler because that's gonna show you all of those jobs and it's super easy to optimize by geography and scheduling. So this is gonna populate absolutely everything. And when this opens.

12016387173

1:02:08 Go ahead.

1:02:13 Okay. Let's see. Yeah. Well, you open this up, you know, these gray ones do not have a technician assigned to them. You drag them over to the tech and then you drag them over to the schedule burst my, but I'm ready. I can take it.

12016387173

1:02:28 I don't need a map. Okay? My, the way we schedule is essentially one guy, one job one day.

SUSAN

1:02:42 No problem. You.

12016387173

1:02:43 So, if I have four jobs, they'll be four. I have four technicians, four jobs, one day. We don't we're not, it's a rare occasion for us to, for a technician to go to multiple jobs. So a map view, is essentially useless, almost useless for me. Okay?

SUSAN

1:03:14 Well, in that case, you can kinda just use it as a place to, you know, kinda have a repository of those jobs. Are you talking about? Like wanting to get things just generally on the schedule? Like like how far would you want to be scheduling?

12016387173

1:03:38 Well... we, I schedule as the work comes. So, for instance, my weekends are generally two to three months ahead, get booked out because there's only 52 of them every year. I deal with critical infrastructure in these buildings and the buildings kinda need to be empty when we're doing what we're doing. So Saturdays are an.

SUSAN

1:04:09 No, they're...

12016387173

1:04:10 They're in great. They're in great demand and less supply. So, my Saturdays, I'm always booked two, three months out weekdays, anywhere from a week to three weeks depending on whatever is going on. Like right now. If somebody called me, I probably could squeeze them in next week. If I had three people call me, we're probably looking at two weeks out. So, you know, that's kind of I like to, you know, I'd like to know what's going on the next week that's my look ahead... the calendar and knowing where jobs are and seeing all that is, I don't see a value in it.

--- Recurring maintenance ---

12016387173

1:04:53 Currently... I have few jobs where we do multiple buildings that are all like, in spitting distance. So to speak. So, for instance, you know, who they are, we do 15

buildings over the course of four days... and that is that's like a logistical thing. It's like, okay, are these, you know, there's three there.

--- Dispatch ---

12016387173

1:05:21 I know in particular, there's three buildings that are on the same block. Like the one is on three of the four corners... now. So the one day one technician goes to those three buildings... but.

SUSAN

1:05:42 You, you know, you have options with this. So, you know, you can, you know, you saw initially, you know, when you create this, you can immediately go right to the job schedule that or, you know, like back on this, you know, the screen go back to the scheduling board. You know, you can kinda just, it doesn't really matter if it all lives on a map, you can just go through when it's time to schedule and just keep working this until there's no more gray. And just you're really just dragging it onto someone scheduled, dragging it to the calendar so that, that's an.

12016387173

1:06:16 Stuff on the left. I see. Okay, I kinda make stuff on the left. Yeah.

SUSAN

1:06:22 Yeah. So like for example, like this one, you know, if I wanted to have Shelby work this, it's gonna... it's you know, not going to be assigned to her as well as that other slightly lighter gray person. If you Zoom way out, you can see this light gray. That means that hasn't been assigned to anyone. So when I go over here, it's gonna change color to Shelby's, blue color and let's say I want her to go out there and work that on Saturday. You just drag it over and then you can adjust the time.

12016387173

1:06:59 Can I put on this? This is job scheduled, calendar view. Is there, can I show unscheduled or no? That wouldn't be unscheduled. So, does this show jobs without a technician, this calendar view?

SUSAN

1:07:23 So, the ones like without a technician, so you can, yeah, see like you would just select, see de, selected sell stuff. So you would just set it so that, you know, like you have your, this is because the demo can ignore all these offices like let's work off of, you know, for example, like architect main solution. So like let's say you would just go through like, okay, I just wanna see what isn't assigned? Like what's assigned unassigned unscheduled? Like, click. And of course, there's other stuff on here. But the only thing that would show up is unassigned unscheduled. And you keep on doing that till the maps empty.

12016387173

1:08:00 But if I don't wanna use that map or I don't have a choice, I have to use the map?

SUSAN

1:08:05 I'm afraid you don't have a choice for scheduling plan stuff. The only other scheduling option other than, you know, going through after you create the job and doing that is our dispatching board. So our dispatching board looks like this, but this is just day by day. This is really more designed for reactive work... and that's just going to have individual swim lanes showing what is on that particular technician schedule that day.

12016387173

1:08:34 Okay. Asking my question clear enough.

12016387173

1:08:43 Like the, in the example, right? So, I have a job scheduled for three months ahead. Where can I see that?

SUSAN

1:08:53 On the, on the schedule for three months from now, like there's a date and time assigned to it, correct?

12016387173

1:09:01 The, the date and the time, no technician.

SUSAN

1:09:04 Date and time, no technician. Okay. So that would be back here if it's three months from now, you would go over to wherever that is and you would see it there... and I just say unassigned, but it would be on the.

12016387173

1:09:25 Okay. This view of the calendar, can you do, can that be monthly instead of weekly?

SUSAN

1:09:34 I'm afraid now just day and we.

SUSAN

1:09:42 So...

12016387173

1:09:42 The monthly review is the.

SUSAN

1:09:47 So, the weekly view is the map. This is, this is.

12016387173

1:09:51 Well, it says jobs due this month, one to four 30 or?

SUSAN

1:10:00 Yeah, no, I was referring to see. I'm like I'm toggling through here, but this is going to show week by week, but you can change this to be whatever date range you want. So you could even do custom and do absolutely everything on here.

--- *Dispatch ends* ---

12016387173

1:10:25 So... so this is where what I currently do and how I think and see things with job scheduling and then trying to implement the service trade way of doing things comes to budding heads, right? So... you call me up, say, Tom, I need you to come out, check my transfer switches... but we need a Saturday like last year and I need, I wanna make sure it's scheduled for somewhere near the end of June or July.

--- *Dispatch* ---

12016387173

1:11:05 What do you have?

SUSAN

1:11:09 Okay. Somewhere near the end of.

12016387173

1:11:10 How do I see? This is why I asked about a month view. I'd like to see all four Saturdays in June and all four and all four Saturdays in July, but I have to scroll week by week to see what's open, right? Yeah, I...

SUSAN

1:11:28 Calendar view it is.

SUSAN

1:11:29 Only by week.

SUSAN

1:11:42 No, you could run a report of, you know, all the jobs that are upcoming, but, you know, that's just going to be an excel spreadsheet and then you could sort it by day but that's not gonna give you any better functionality.

12016387173

1:11:54 You know, use Google calendar. Now. I use Google calendar because I can look at a month and customer calls up and I go, right? I've got an opening... July eighth, Saturday. He goes. No, no, that doesn't work that doesn't work. No, what let's how about August? What have you got in August? And, you know, Google calendar shows me my month. So within two seconds, I see all four Saturdays for the month and I know what's there or not there.

--- Dispatch ends ---

12016387173

1:12:29 I don't need to scroll through, wait for it to refresh. If the internet is trash that particular day, which sometimes my internet is trash where my office is.

12016387173

1:12:42 It'd be an adjustment obviously... but it's just, it's a visual thing. I'm trying to, you know, so, you understand what I currently do and why I do it. I'm you know, I have this box of, I wanna see all these days, you know, if someone's really trying to squeeze something especially near the end of the year, it gets kind of insane for us. Everyone trying to squeeze stuff in. Do I have the guys? Do I not have the guys?

12016387173

1:13:13 Usually by mid September, my Saturdays are full because we have those terrible holidays that come at the end of the year, thanksgiving, Christmas, New Year's, right?

SUSAN

1:13:27 Yeah, I mean, so, yeah, that.

12016387173

1:13:29 Have to wait two more years. We have to wait two more years before the end.

SUSAN

1:13:34 Like, I completely get that.

--- Dispatch ---

SUSAN

1:13:39 But yeah, I mean, okay... there there as far that, you know, like I mentioned, they are kind of revamping the screen. All, I know that it's a revamp is on the road map. I haven't seen that, but, you know, again, this is the options in terms of scheduling, you have that you have the job screen, you can schedule from the individual job, but, you know, like I said, we don't have a month view... but yeah, so, that is scheduling. And then...

12016387173

1:14:09 Shows a month, the map shows appointments in the month.

<div align="center">SUSAN</div>

1:14:13 Exactly. Yeah, the map will show you that, but no, there's not a calendar that will show you the month on a calendar.

<div align="center">12016387173</div>

1:14:24 You know, we're talking about New York City. The island is what's the island, 50 acres... 100 acres, whatever it is.

<div align="center">--- *Dispatch ends* ---</div>

<div align="center">12016387173</div>

1:14:37 A... know what that's gonna look like? Yeah. Does it keep that if I zoomed in, it doesn't change even if I leave this, I leave this screen and I come back, it's gonna hold my view, my last view.

<div align="center">SUSAN</div>

1:14:57 When you refresh it, it's gonna take, let's see what happens. Let's see. I think it's gonna be or is?

<div align="center">12016387173</div>

1:15:07 Yeah... I would guess it zooms out.

<div align="center">SUSAN</div>

1:15:11 Yeah, because.

<div align="center">12016387173</div>

1:15:12 When you load back in the page, you essentially refresh...

<div align="center">SUSAN</div>

1:15:17 Yeah, yeah.

<div align="center">12016387173</div>

1:15:19 You set the, can I set this location of where I want it zoomed in on or like because my office is 70 Miles away from New York City.

<div align="center">--- *Accounting* ---</div>

<div align="center">12016387173</div>

1:15:34 And if it's zoomed into my, where my office is and are always centers on my office. I'll never see my jobs because they're always going to be in New York City. They're 70 Miles away. So, can I like set the default as, you know, I pick a zip code or an address?

<div align="center">--- *Dispatch* ---</div>

1:15:59 Or is it like if I'm in California vacation and I open up the map to look at the appointments for the week, is it gonna open it in California? Where I am?

SUSAN

1:16:18 That is a good question because I am not in Raleigh and that seems to be the center of this.

--- Dispatch ends ---

SUSAN

1:16:26 Like I'm further, like where I'm at is currently not on the screen. That's something I can ask about if it can start. But, yeah.

12016387173

1:16:38 Well, I assume that's to the company information, right? We enter a whole, you know, who we are for all the letterhead and the invoices and the reporting and all that. So, you know, so you'd have, you know, Susan in North Carolina as the company name? And obviously, it's I don't know harder, right? That's who we are today.

SUSAN

1:17:01 Yeah, yeah, we are. We are a dark.

12016387173

1:17:04 And this is corporate headquarters, Raleigh. I think I look at that email you sent me. I believe it says Ali.

SUSAN

1:17:11 Yes, you're correct. That's why it's doing it because.

12016387173

1:17:14 Going off.

SUSAN

1:17:14 Of your, that's good job that's a.

12016387173

1:17:18 Right. So, well, so... right, Raleigh, North Carolina. So... again, I'm not, I'm 70 Miles away from where my appointments are. Now. I don't know what the scale of this is. Looking at it... pretty big, I guess isn't it... not familiar with all.

SUSAN

1:17:47 Yeah. I mean, so if you wanna, I mean, why not? Let's go to New York? Let's scroll our way up through DC, Baltimore, Philly.

12016387173

1:18:11 Okay. So see what happens when you refresh? I was gonna show you where we are, where my office is related to.

SUSAN

1:18:23 Yeah. Where, where are you... on?

12016387173

1:18:28 Roll out, okay, Zoom out a couple of times. So we are in orange county, New York. All right. So, if you see the, see where that 287, right above Yonkers, the 17 where 17 and 287.

SUSAN

1:18:57 Huh.

12016387173

1:18:58 The left in going west and then you go north on 87.

SUSAN

1:19:06 Zoom too fast. No, too far.

SUSAN

1:19:11 Going north on 87 where?

12016387173

1:19:14 So, you see Chester and Florida. So go north on 87 and then you're gonna go there's, goshen on the left.

SUSAN

1:19:21 Okay. 87, 87. Is it north of new pal?

12016387173

1:19:29 You went too far? No stop. We're all the way down at the bottom... follow 87 and head a little west. You'll see Wood, bury, Chester got would.

SUSAN

1:19:43 Right.

12016387173

1:19:43 So, so that's goshen. So that's where my office is.

SUSAN

1:19:48 Gotcha.

12016387173

1:19:49 There's not much there. There's not much there. Trust me.

--- Quote templates ---

SUSAN

1:19:54 I, a lot of you. Instead, I've heard of it before, but yeah. So in summary, that is scheduling, it would be an adjustment, but that's how we do it at the moment. I do wanna kinda dig back in on, the initial, but, yeah. So in terms of the work order, you know, like I said, those parts in labor as well as, you know, that description can be part of the template. And then you can add to this work order. You can add as many appointments as you like. And you can have multiple services on multiple assets on this job.

12016387173

1:20:31 Who sees the, who sees the pricing?

SUSAN

1:20:35 Whoever you want, you can change permissions however you like, can be just you.

--- Access to information ---

12016387173

1:20:38 So, can I have? Yeah. Okay. I don't the technicians never see parts and pricing... labor pricing. They never see.

SUSAN

1:20:50 Change that, change that permission a big deal. But yeah. So when they go in from the mobile screen and clock in, clock out all that's gonna appear there. And then the asset information, that was something I was gonna ask you about like, you know, using kind of the free tools is, do you have to feel on calls to get equipment history?

--- Assets ---

12016387173

1:21:23 Ask the question again?

SUSAN

1:21:27 So like, you know, for example, like, you know, I've clicked on, this asset and it's gonna show me every single work order that's ever been performed on. It is gonna show me all the quoting opportunities, all of that and that's going to be accessible on the mobile view as well. I'm curious, if your guys call you a lot to get that information.

12016387173

1:21:49 So that is one of the, that's essentially one of those 16 pieces of paper they have. Well, no, I shouldn't say that. So that one of the piece of paper they get is essentially an equipment sheet of what was done last year on it... and the, what the equipment is and the options. And yada, if there's ever been repairs or anything like that, they would, yes, then have to call and say, hey, did we ever work on this before? Have we ever looked at this before or anything like that? So, yeah. So I like that you can have the service history on an individual asset. We currently don't keep our records in that manner. The, the records are, the assets are essentially combined as one. And then you can look at individual ones and see now... when we go out and we... one day we touch every single asset, right? How does that work with the record? It's gonna put them individually and.

12016387173

1:23:20 Because my, no, no, no, not so much that I guess I'm jumping ahead a little bit, but.

12016387173

1:23:34 How would, how would it be handled if the job is all the assets? And?

SUSAN

1:23:45 How would you get your old history into there? Or are you talking like once you're fully let's say hypothetically two years in, do you use a search? What would that look like?

12016387173

1:23:56 Yeah. So, yeah, it'll be too complicated to try to figure out how to get it in there, right? So let's just say it's there, right? So, I've got let's say there's 10 of these 10 of these package gas AC units. So each one of them for the past two years, has a job has the same job assigned to it.

--- *Assets ends* ---

12016387173

1:24:16 They go out there. They work on all 10, once a year, every quarter or whatever it is. And each one of them has the same exact job tied to it. Is that, that's essentially the, that's essentially what we would see, right?

SUSAN

1:24:31 And, but, you still want the ability to record information about each of those individual, Tim? Is that correct?

1:24:40 Correct?

SUSAN

1:24:43 So, in that case, you could do that. So you could have like a group if they're all kinds of together. That's I mean, that's really dependent on how you want to organize things or you can have them all done visually. So...

12016387173

1:25:01 I'd have to dive into, right? I'd have to dive into the assets and sub assets and kinda play with it to determine what would work best for us and what makes sense?

SUSAN

1:25:13 Yeah, because.

12016387173

1:25:14 Like right now, you just click...

SUSAN

1:25:15 On that. Yeah. So, we could do that and that would that's just an extra layer of organization if you wanna do it that way.

--- *Recurring maintenance* ---

SUSAN

1:25:23 But yeah, I mean, that's definitely a you call. But when you click on this is gonna say here all, you know, like the preventative maintenance that we have going with this, if I had gone out and performed a repair on, it would live there. And then here's the work orders here's.

--- *Assets* ---

SUSAN

1:25:38 The quoting opportunities here are the quotes, but you see how there's that sub assets in there and that's really a way for organization. But the other cool piece of this is that, you know, on the main asset page, you can add in diagrams manuals, comments, anything that's going to be helpful for your folks have to have out in the field?

12016387173

1:26:02 Does service trade have a like a global repository that I could add manuals and stuff too? Or... we have, we call it our publication library... which is drawings manuals, diagrams. It's information that we've gathered over the past 30 years on all the different brands and types of equipment that we worked on.

SUSAN

1:26:39 Typically, most of our customers want them organized at the asset level and that's really the primary reason for doing it that way. I mean, you could certainly always, you know, if it's something that like lives.

12016387173

1:26:54 So you could make like I like to talk in cars because they're generally more understandable. So I could make an asset called here, right? And in that here, I could attach all the owners manuals of all my favorite sees that I've ever owned over the past years of my life, right? And then as a sub asset, I could put my 1995 core year one and my 2000 Camaro et cetera. Right?

--- Recurring maintenance ---

SUSAN

1:27:25 If you want. Yeah, I would. But, but it's not, it's going to I'll at like think of them as like Russian nesting doll. So like, the asset can only live at that one particular.

12016387173

1:27:40 So...

SUSAN

1:27:41 You would have to, yeah that address. So like if there is, you would need to repopulate that, you know, let's yeah, let's say, you know, there's a group of five of these things.

--- Assets ---

SUSAN

1:27:51 And so you do each of those five as a sub asset. You'd want to attach the manual or whatever information you want to that main asset so they can access them.

12016387173

1:28:01 Okay. That's not worth it to us. I would just have them put Dropbox on their phone and I got it because that's what they're used to already. It would be a lot of work to add that stuff in... on a regular basis. So we tend to do that with customers that have weird things.

12016387173

1:28:33 Okay.

SUSAN

1:28:35 Gotcha. You know, and then, you know, I'm just seeing what's available... you know, and if there's ever anything that's particular to a customer, you can also add attachments on the location level, for example, like a map of the building of where things are. You can put those attachments and they're on the location level and have folks be able to see that.

--- Access to information ---

SUSAN

1:29:05 But, yeah. So just to take a quick look and see what this looks like from the mobile perspective, let's head over there.

SUSAN

1:29:20 So this is that job and service trade.

SUSAN

1:29:28 It would have your full schedule listed out for that day. And then when you click on that as going to have that similar information.

--- Tech On-site ---

SUSAN

1:29:35 But now it's in a mobile friendly format. If they want to clock in, they can go down here and then swipe across to indicate that they're in route and they then they can tap on that to notify the customer via email. And with a time of expected arrivals, let's say in this case, we're gonna get there at one 30 and that's gonna send a quick email letting them know about that. And then after they have finished their drive, they can clock out of being in route and clock in as being on site.

SUSAN

1:30:14 So from there, that same information is going to be available now in a mobile friendly format. So you can go into services, see that checklist of what is expected to be done there.

--- Assets ---

SUSAN

1:30:26 Again. If there are multiple services and multiple assets, they would all be there. And then down here, this is the asset that we are servicing for this one. That same information that we just saw in the office view is still accessible. And then if you have a question about other assets at this location, you can head over to all, click into these individually and see all of those as well.

--- Quote templates ---

SUSAN

1:30:54 And then under job items, you're going to have that parts on labor list... that came from the office view. If something extra is needed, they can click that plus button, add from your list that, you know, you upload bulk upload to the back end of commonly used parts and labor. So that will pull from that list or they can add something brand new by clicking the plus button.

--- Parts management (inventory) ---

12016387173

1:31:20 Be disabled.

SUSAN

1:31:24 The ability to add new parts? Yeah... I am not sure I can ask.

12016387173

1:31:34 No. And then the second part I guess would be if it's not disabled and they go to add a part, does it have to be in the parts catalog or can they just type willingly?

--- Quote templates ---

SUSAN

1:31:45 They can do either?

12016387173

1:31:46 They go.

SUSAN

1:31:48 So, if you click plus and you click select job item that's going to populate your list and they can search for that list or if they wanted to add something that is not existing, you know, they can tap that plus button and that's going to let them key that information in.

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

12016387173

1:32:08 But I don't want them putting any pricing in.

SUSAN

1:32:12 I'd have... to check on to see if this function is available. If you don't yeah.

12016387173

1:32:21 And I also don't want it visible to the customer.

SUSAN

1:32:26 Yeah. No. So the cost is not gonna ever be visible to the customer only pricing displayed, the way you want it to be displayed is going to be visible.

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

12016387173

1:32:40 I said my guys are just technicians.

SUSAN

1:32:43 Yeah. Now, I can check and see if this, you know, the ability to add new parts can be turned off. I don't want to speak to it until I confirm that, but yeah, I'll ask about that ability, but I know that in terms of, you know.

12016387173

1:32:57 I mean, quite honestly, I don't even think this job items is, no, I don't it's kinda useless.

SUSAN

1:33:07 That's fine.

12016387173

1:33:09 The way we currently do business. So if that could just get shut off, that'd be fine. So.

SUSAN

1:33:14 Say the job I...

SUSAN

1:33:19 So, when you say be shut off, like do you mean like, for the technicians themselves or are you talking about it just in general? Okay?

--- Pricing ---

12016387173

1:33:31 Just for the, for them, just for the tech, they don't need again, they never see pricing, they never see quotes. They don't interact with the customer with any kind of money transactions. Again, 99 percent of my customers are multi 1,000,000 dollar companies. They send us a check in the mail after I email them an invoice.

--- Invoicing ---

12016387173

1:33:54 We don't collect credit cards on site. I have three customers that I take credit cards from, and they pay the percentage and I only do it because it's so minimal. It's

such a minimal amount of work, but I don't take credit cards. Everybody either pays with a check or AC, H again, multi 1,000,000 dollar companies that I have portfolios of property owners, real estate companies in New York City, six, eight, 10 buildings, you know, probably it's you know, a couple of 1,000,000,000 dollars worth of real estate.

--- Parts management (inventory) ---

12016387173

1:34:33 My technicians do not touch any money. We have no monetary transactions in the field in any way shape or form. So the job items, and then, and to add to that, I do not have any parts inventory. We don't have an inventory of parts. There is no parts catalog doesn't exist.

--- Deficiencies ---

12016387173

1:34:53 We sell labor hours, I sell parts for repairs and all that, everything is quoted. Though all any money transactions are done by me to directly with the customer. The technicians have no, nothing to it. So I feel like we have deficiencies. So if the job needs parts, it's gonna go into deficiencies.

--- ST app contracts and pricing ---

12016387173

1:35:16 And they're gonna say, cause we don't carry parts with us. I mean, we do, but disposable parts, light bulbs, toggle switches, things like this.

SUSAN

1:35:26 Nothing you wanna go out for understood?

12016387173

1:35:28 It's not something I'm not gonna put a line item and say you owe me two dollars for a toggle switch.

--- Access to information ---

SUSAN

1:35:33 I see exactly what you're saying. Yeah, no, yeah, of course. Of course. I completely get that.

12016387173

1:35:39 I...

SUSAN

1:35:42 Would say.

1:35:43 For my technician, for the mobile app, if that can get if the job items can get shut off, fantastic.

SUSAN

1:35:50 Yeah. I would say we can't get rid of that block.

--- Tech time tracking ---

SUSAN

1:35:54 There's no way to remove the block. However if you just want to put, you know, because it sounds like most of the time you're it's going to be labor. And then you later on in very certain instances, sometimes adding items. So just put in the number of labor hours that suggested they're not going to see the cost of that because you're gonna turn that off and permissions.

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

SUSAN

1:36:18 And, and then, you know, even if somebody went completely rogue and chose to like key something in or add something that's gonna be that's going to be, very obvious when that work order is returned before you generate at the invoice that can be deleted off. If somebody is going rogue and doing that.

--- Deficiencies ---

SUSAN

1:36:35 But in terms of them, you know, while they're going out there being able to report in a quoting opportunity that's really just about the information that they're gathering. So when they go in to do that, they can just go into the deficiencies that's all the previous deficiencies found at this site. And then they can click plus and just, you know, describe what's going on. You know, let's say it's a broken compressor... and then they can add photos, video, voice memo. A lot of folks see a lot of value in the voice memo because it saves them from typing. You know, they can just easily attach that, you know, we find that one with like four to five pictures or video, see a significant quote approval rating increased. So you can say that there, I mentioned all the other attachment possibilities and then it's just gonna ask you very briefly how bad is it? It's an operable? You wanna make sure that it's organized properly. So it's tied back to correct asset. It's gonna automatically fill in the service lines and no action there. This is a new deficient and this is required. But if you, if they want to, they can propose the solution. But this is all gonna come back for you to review. So replace.

--- Deficiencies ends ---

12016387173

1:37:54 Yeah. I like this part. I like this. I have three or four stars next to it, from my initial notes, like I liked efficiency reporting. This is huge, like it's really, it's a really nice and it's you know, the end of the day a service company is about the data, right? It's really about the information that we gather, you know, yes, we're going out there and, you know, we're cleaning this and replacing that. But without data, how would we know to replace that? How do we know to clean that? So this is, you know, data is huge.

SUSAN

1:38:34 Absolutely. Yeah. I mean, this is why when, I mean, because I know in our conversation, I didn't have to run through that, but if someone came to me and said, Susan, we are purely reactive. We don't want to send a lot of quotes. We just want to go out, do a handshake and charge a credit card. I'd be like go find something cheaper. You don't need this, you know, like you're buying an F3 fifty for weekend trips, solos. Don't do this. Now, I've gone into card analogies. But, yeah. So, that is the deficiency loop. And then, the pieces when we go back over here to the office... let's see. I want to.

--- Quote templates ---

12016387173

1:39:14 My issue with the job items is those are required for the quote. The quote is the right. Your quote is generated off those job items and I don't want technicians to have access to the job items. Yes. Isn't that right? The quote can be generated off the job items.

--- Quote templates ends ---

SUSAN

1:39:35 Not at all. You, you put that in the office. So you hang on, you broke up there, sorry?

SUSAN

1:39:46 Hang on. I'm actually gonna switch to a different...

SUSAN

1:39:47 Microphone because this battery is about to die. Okay?

SUSAN

1:39:54 Now, you're on my external microphone, I'm gonna go to Zoom and sharing... and now I can share this.

--- Deficiencies ---

SUSAN

1:40:13 So, we're back here on this.

SUSAN

1:40:15 Location, let me just hit refresh as soon as that's done.

SUSAN

1:40:20 That is going to trigger an email to you or whomever you like saying, hey, a deficiency has been reported?

12016387173

1:40:33 I think.

SUSAN

1:40:33 Clear.

SUSAN

1:40:35 Some of these 70.

SUSAN

1:40:35 Five tabs I have open... that clicked on the wrong one apologies.

SUSAN

1:40:49 Go down here to deficiencies.

SUSAN

1:40:54 And then there's that newest one... reported today.

SUSAN

1:41:02 I...

12016387173

1:41:02 Here's, the job and it's still, and it automatically shows up even though they're still on the job. Yeah, love that nice.

SUSAN

1:41:18 Close. So this is.

12016387173

1:41:24 Sorry question was more related to, you know, customer calls up and says, hey, I need a quote for you guys to come out this year to do maintenance.

--- *Quote templates* ---

12016387173

1:41:36 So, when I create that quote, I would put the, I would put those job items to create that quote. That was my question. Maybe, yeah.

SUSAN

1:41:45 So, this screen that you're seeing right now and, you know, like we just walk through, with the technician, you can do that from the office view. So like, you can go over.

--- Quote templates ends ---

SUSAN

1:41:59 And then make a brand new deficiency and it's gonna have when you.

SUSAN

1:42:03 Go into that is going to have those same fields basically. But this is just basically setting you up to send that quote out. Now, something I did not mention because it isn't add on product, but it's something that considering, you know, if the goal is to sell more planned maintenance agreements, if that is your goal and you want to put together really beautiful, potentially complex proposals like multi paid proposals for those.

--- Deficiencies ---

SUSAN

1:42:32 We have.

SUSAN

1:42:35 Or said, okay, fair enough. So, because...

12016387173

1:42:39 Other son, so you don't...

SUSAN

1:42:40 Need...

SUSAN

1:42:41 One day of that average just now we're here. So anyway, from this efficiency page, you turn a deficiency into a quote. Of course, you review this information, whatever they've keyed in here. And then from there, you create a quote. And so the, so this is a repair this?

--- Quote templates ---

SUSAN

1:43:03 Quote expires on the thirtieth you create that quote and...

SUSAN

1:43:08 You know, as soon as you create it's, going to be pretty bare bones because you haven't given it any data to give you any information, but we can apply when.

SUSAN

1:43:18 Our...

SUSAN

1:43:18 Global quote.

SUSAN

1:43:19 Templates here and just make edits to that. So this is like, I...

SUSAN

1:43:25 I say we've kind of even switch.

SUSAN

1:43:26 Frameworks here and said.

SUSAN

1:43:28 You know, this is something.

SUSAN

1:43:29 You create in the office to.

SUSAN

1:43:31 Then turn into a quote for plan maintenance. You wanna get out your planned maintenance quote. But in this case, we're just replacing a compressor and so this is gonna be your information that you K in is description and then it can just be labor totally fine. You can have parts on. It doesn't matter however you wanna do it.

SUSAN

1:43:51 And then you can click these pencils to change any of these items here. And then when you click here, you can change the.

SUSAN

1:44:00 Way that the pricing is displayed. So right now, it's line item group. But if you want to do a grand total also totally fine. That's all they would see. And anytime you generate a quote or an invoice and service trade is always going to internally on.

SUSAN

1:44:16 Of course, from the office we have that.

SUSAN

1:44:19 Margin per percentage. So in this case is a 36 point seven percent. And then it's gonna carry over that picture with it to help that quote get approved. So from here.

12016387173

1:44:36 So for us, when I say I have no parts inventory now, we have these disposable parts, then we do have stuff that we use now... other than... a few specific repairs upgrades.

--- Quote templates ends ---

12016387173

1:45:00 I generally order kind of one off parts for almost every repair as crazy as that sounds. But it's...

SUSAN

1:45:09 Yeah, that makes sense.

12016387173

1:45:11 Stuff gets broken. You know, when stuff gets broken, even though there might be 10,012 1,000 of these transfer switches out there in the world or a 1,000,000 of them.

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

12016387173

1:45:21 And I need widget K6 eleven and 95... you know, and, I order it, I buy it. I quote it and I may never see it again. Yeah.

SUSAN

1:45:36 If that's the case, if it's just these random ones, you don't put anything in the back end, you can just go in here, click plus and then you can manually say, you know, right? Random text.

--- Quote templates ---

12016387173

1:45:51 Like, yeah, that's how most of my, that's how most of my quotes would end up is, I would literally be adding it in as we go.

SUSAN

1:45:59 Yeah, that's fine. But, you know, if your language is similar, you could save a lot of time by using this part of the template.

--- Quoting ---

12016387173

1:46:06 Yeah. No, I mean, I have to say, you know, I have a quote template quote or quotes. It's a word document and I just change the two and, you know, the address, the customer, the, you know, how many of these, how many of that, what they're looking for? This failed, that failed. And yeah... okay.

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

SUSAN

1:46:28 Yeah, I just populate right there. And then, you know, you can make those small tweaks for the one off cases. But in terms of as a refresher of what this looks like, I'll send this to you as well along with this beautiful picture of my microphone. And as a reminder, if need be, you can require a po in order to approve. If anybody needs that extra layer of accountability, we can review that and then send it off. And as a refresher, this is what the quote actually looks like. Once they click into that email... and front center. And just to be clear, this is the way it has to be organized. There's no switching it up but, you know, build a ship to your brand description, parts labor displayed the way you want them. And then the photos, TS and CS, comments to the bottom.

12016387173

1:47:26 Where do those comments come from? Is that from the deficiency report? Or did I enter that you enter those comments in the previous screen?

SUSAN

1:47:35 Screen, you can add comments if you like. Okay. Yeah. Even if it's just like, thank you for reviewing this in a timely manner.

12016387173

1:47:48 I'll day.

12016387173

1:47:55 How would you do a proposal? I don't know if there's any examples there. How would you do the proposal with multiple options? So I'm going to give them option?

--- Pricing ---

12016387173

1:48:06 So we found a deficiency here are the option AB and C, right? One is 1,000 dollars. One is 2000 dollars and option C is 3,000 dollars. How would, how, can the system handle something like that? Or what I just have to make it a giant text wall like I currently do.

SUSAN

1:48:29 It would, there isn't an, for in this tool again, that more robust proposal tool that we added on the, you know, the multi pages there, you can do a good better best. But on this, it's there's no way to, you know, like here's one option for seven, you know, like you said, and then you can choose like and click the button like I want option one.

--- Quote templates ---

SUSAN

1:48:51 I want option to, I mean, you could kinda do like a boot leg version of that, but... yeah, it's really not designed to easily facilitate good, better best quoting.

12016387173

1:49:06 In the parts labor and items, if I didn't put anything in there, like I noticed where it says service to be completed and that's blank. It doesn't can I delete service to be completed? Like just that verbiage or no service or parts service labor? Like if there was nothing in there, can I just delete that stuff from the quote completely?

SUSAN

1:49:27 So, you could change the way this is set up so, that no surface doesn't show up there.

--- ST app contracts and pricing ---

SUSAN

1:49:31 That's just the way that's organized. But ultimately, these items and their prices are going to be what determines the total price of the quote. Like there's no way to like... go in and, you know.

12016387173

1:49:55 Not show sub totals, tax total grand total. Can that all be eliminated? Can I just show service items, service part service labor?

--- Quote templates ---

SUSAN

1:50:07 No.

12016387173

1:50:10 For instance, imagine each one of those is an option one, two, three, four, five, six, right? So I don't need a total. They're showing you.

SUSAN

1:50:22 So, since that quote has already been generated, let's go down. I'm gonna show you all the different ways that we can choose to display things. So there's line items with prices... you can summarize by line item, total grand total only. So... line item by grand total only, et cetera.

SUSAN

1:50:50 If we did a grand total, let's see what that would look like.

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

SUSAN

1:51:04 Yeah.

12016387173

1:51:08 Right. I don't well, I shouldn't say I don't have multiple options because I do, I essentially have two prices for every quote. I send option a, an option B, one, one is straight time and one is over time, but I don't need a total on any of my quotes that I send... unless like for my maintenance quotes, at least not deficiency quotes.

--- Quoting ---

12016387173

1:51:35 Well, even deficiency quotes. I'm gonna have it straight time and over time as depending on what we're doing depends on, what the, what they can do. So, I have two prices on every quote I send... straight time and over time.

--- Quoting ends ---

SUSAN

1:51:52 Mean, full disclosure. The only way you could do that in service trade if you actually want to approve them, is to send two different quotes.

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

12016387173

1:52:15 And, we can't get rid of the sub total, grand total tax in any which way shape or form. We can't show any total like that that's not an option to show?

SUSAN

1:52:26 To just basically send this without this being displayed, correct? No, every quote has a in.

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

1:52:53 That's an issue.

SUSAN

1:52:56 That's fair. I mean, yeah, I mean, like I said, there's no way to turn that off. You can have two different one.

12016387173

1:53:02 It's an issue because, and it's not, you know, and I'm not trying to be square because this is how I always do it.

--- Quoting ---

12016387173

1:53:07 But when I send a quote, there's these accounting departments that are absolutely rigid and they will say if it has a total on it and it's not correct, we're not issuing you a purchase order... which means I have to revise every single quote twice or create two quotes every single time a customer asked me for a proposal, which both in my opinion are ludicrous, we're trying to save time... right?

--- ST app contracts and pricing ---

12016387173

1:53:37 So, why would I want to create two quotes or send a quote that I know is gonna have to get revised?

12016387173

1:53:49 Yeah.

SUSAN

1:53:52 That, that is fair... completely get that.

12016387173

1:53:57 What if here's an idea? Let me try this. Can I, put in items with zero quantity and it will show a price. So, my resulting price in grand total will be zero.

SUSAN

1:54:13 Not...

SUSAN

1:54:20 I need to, this has been sent. So I need to copy it again.

SUSAN

1:54:27 I go in here and I make literally all the quantities zero… or would you make the quantity zero? Would you the cost or the actual price zero?

12016387173

1:54:39 The, the quantity zero because I wanna show the price of everything for the customer.

SUSAN

1:54:51 Would you okay, so that's gonna, that's what I'll gonna say like this. This is gonna spit out a zero dollar load.

12016387173

1:54:58 Beautiful.

SUSAN

1:55:02 Let's see it.

--- ST app contracts and pricing ends ---

SUSAN

1:55:12 So, this is, it's it now looks free?

12016387173

1:55:17 See, it deleted them. It said there's no parts.

SUSAN

1:55:20 So far, yeah, but, the equivalent of like walking up to somebody at the grocery store be like the tag is, and all this, do I get this bunch of bananas for free?

--- Quote templates ---

12016387173

1:55:34 But there's nothing here. It didn't it didn't carry over the parts because they're zero quantity. Okay?

SUSAN

1:55:39 Yeah, yeah. I mean, I'm just being a little bit, but, you know, obviously, I don't think any, you would put it in verbiage saying, you know, blah, blah, blah, you know, however you want to phrase that. But yeah, I mean, if it works.

12016387173

1:55:57 Again, remember, for me, I quote everything as a straight time number and a over time number, right? Because we're 90 percent of what I do is selling labor. So I have, so every quote I have has two prices on it… and I wanna use your system to do

less work... and express the customer that this is, you know, that there's they have two options here.

12016387173

1:56:29 Do you wanna do it on straight time, mister customer? Or do you wanna do it on over time, and year to year, some of my customers change? They're not always on overtime, not always on straight time.

12016387173

1:56:41 It does change not often once we, you know, once they kinda pick it's like, nope, it's always on over time. So I don't need to quote straight time, I only need to do straight time and over time for repairs or deficiencies, which brings us back full circle to, I still need a way to show option a, an option be in my quote. Yeah. And it doesn't appear you guys have that.

SUSAN

1:57:07 Yeah. I mean, it would have to be just in the body of the text. But then at the end of the day, like let's say, it's in the body of this text and it says, I mean, would there be... just to be clear, like sending two separate quotes would be like, hey, I sent you one for straight time. Hey, I sent you one for overtime. Would that be completely out of bounds for your customers?

12016387173

1:57:37 It's it's kind of cumbersome. Don't. You think?

SUSAN

1:57:40 Yeah. I mean, I'm just thinking cause wait if you send a single quote and like let's say on here, it says you have two options, blah blah blah option one, blah blah blah option two that because, I didn't actually send it, but, you know, when you do this and actually send it out to them... it's...

12016387173

1:58:02 Yeah. I mean, I could put it in the quote description. I could put the pricing, but then it's not, you know, I don't get all that nice, you know? So I don't get all that nice addition subtraction all that. And then when I have to revise the quote in order to make an invoice. Again, we're duplicating what doesn't need to be duplicated.

SUSAN

1:58:24 Yeah, because the way service traces onto work is to basically take the items that are on the quote. And then once this gets approved, you then convert that into a job, you work job?

12016387173

1:58:39 Yeah, of course. I would hope so. That's the whole point that's a whole point of having, the seamless system, right?

--- Quote templates ---

12016387173

1:58:50 Is so that it's all together. It's all in one place. So, if I'm putting pricing into the body of description of work, nobody knows, essentially, it's like you said, it's a zero dollar quote.

SUSAN

1:59:02 Yeah. I mean, the end of the day, it's those two options. It's keeping it description of the body with zero dollar quote or it's two separate quotes there's just no good, better best option with.

--- Type of work ---

12016387173

1:59:15 You're saying, there's a super fancy service that you guys offer that would do that.

SUSAN

1:59:23 Yeah, I mean, and I say super fancy. It just has that capability. Is this? It's a cool tool called Northboundary and it's designed. We bought it. We bought the company from the guy that created it, you know, like 10, 20 years ago because it is designed to sell me, can do like big installs, but not relevant to you signed to go out and sell plan maintenance agreements like, you know, you've seen someone out there.

--- Type of work ends ---

SUSAN

1:59:54 It even has like a little OCR, you scan a number and it automatically generates based on, it, has like industry information in there that you could then go in and tweak and say, okay, you scanned, you know, xyz type of unit and then it's gonna templatize the maintenance schedule for that, generate a proposal for it, send that proposal over that does have good, better best options baked into it. They can sign electronically and you can track the sales cycle with it. That's that's designed to, yeah, it's very sweet.

12016387173

2:00:29 That's really, that sounds amazing. I will admit. I bet it doesn't have transfer switches it.

SUSAN

2:00:35 Not transfer switches. I'm not a lot of you to you, but the whole point is that you would build all that stuff like you would say like, okay here's that in there. And like, I know that if we want to do play maintenance for this kind of thing, we need to change the I'm gonna say filters knowing that's wrong, like quarterly, we need to do this monthly. We need to do blah blah lot and it's just like does it for you. And then, it syncs up with ServiceTrade.

--- Pricing ---

12016387173

2:01:06 What, what kind of dollars is that?

SUSAN

2:01:11 Okay. For the first year and then it's an extra like 4,900 the first year, and then it goes to like 3,500 a year after that, because there's an onboarding fee.

SUSAN

2:01:30 But if it helps to sell like two more maintenance proposals and it's paid for itself.

12016387173

2:01:38 Need couple more than that to get five grand out of it.

SUSAN

2:01:42 Okay. Few more.

12016387173

2:01:46 Well, yeah, we do. We do, our average is about 2,200 dollars per day for customer.

SUSAN

2:01:58 Okay. Yeah. But yeah, that's called Northboundary. That has a whole interesting. Yeah, I can, but yeah, I mean, like that's really the whole concept of it is, you know, you can, if you have folks out in the field, you can scan information or if you know, someone calls up and you can key that in and it just populates a whole cool templates.

--- Pricing ends ---

SUSAN

2:02:22 And, but it's it also has like a sales tracker. So, if you wanted to like grow and have like another person going out and, you know, helping sell these things, then you can track the sales cycle, see like where things are at. If people are opening stuff, all of that. And then once it gets approved, then the information goes in a service trade.

--- *Purchase decision* ---

SUSAN

2:02:48 Right. Yeah. I know we've been chatting for a good chunk of time in terms of sorry. Is there anything else that's something that we need to cover?

12016387173

2:03:05 It's pretty straightforward.

SUSAN

2:03:07 So, I mean, you tell me like, I know there are some things you like, some things that, you wish were different, you know, does it make sense to, you know, continue the conversation you wanna look at other stuff. Do you want to investigate Northboundary, for that? You tell me?

--- *Purchase decision ends* ---

12016387173

2:03:28 The quoting thing is a lot of money for something that I only need option a and B for at the end of the day... I don't really need sales tracking and all that other stuff?

12016387173

2:03:49 The, the only thing we didn't really go over is like reporting and form template stuff.

--- *Forms* ---

12016387173

2:04:00 Now, I use a lot of forms like my reports, my service reports are essentially, you know, those 16 pages are 10 pages of forms. Again. One, one form for one piece of equipment. Now, customer has 10 pieces of equipment. There's 10, he gets 10 pages, 10 forms. The forms are currently have minor variations based on manufacturer model... of that particular piece of equipment.

--- *Assets* ---

12016387173

2:04:39 That particular transfer switch. They're all, very similar. Like I said, they're very similar, with minor adjustments based on the, what it is that we're actually

working on. We have another group of forms that we use that are not for transfer switches, but there's only very small.

--- Forms ---

12016387173

2:05:03 So I really, I would like this transfer switch form to be digital, that or some version of it to be digital that can be integrated into the service trade. So that when the customer is on site, he pulls that up, that form fills it out and it's attached to the job so that I can then see it. Now, my notes tell me you guys don't have that integration that it's kind of a separate thing. So he would have to leave the app, open up Adobe form maker, whatever his Adobe form, fill it all out and then attach it to the job. Correct? That's correct? Yeah. And my issue is that.

--- Forms ends ---

SUSAN

2:05:54 Just super, briefly, I do have this alternate idea. Do you mind if I take a quick restaurant retail?

12016387173

2:06:01 Sure. Go ahead.

--- Forms ---

12016387173

2:07:16 All...

SUSAN

2:07:16 Right. So yes. When it comes to forms, they're really there's you know, keying in specific information. There really is kind of three options with that. The first one is what exactly what you're describing is you upload the PDF, we can create smart rules. So they don't have to key.

SUSAN

2:07:38 And things like...

SUSAN

2:07:40 The name of the equipment, the name of the customer, that kind of thing, but they, you know, they are going in and editing within Adobe. That form. That is option one. Option two is the use of service forms. Frankly, I do not recommend that for people that don't work within our standard industries like refrigeration and H by.

--- Forms ends ---

SUSAN

2:08:05 Production, that kind of thing.

SUSAN

2:08:07 Because the cost of customized forms increases the total cost by a great deal because it is something that, you know, programmed. Basically the other idea that I had, looking back through the notes, there is a way where you can have a section...

SUSAN

2:08:28 Of the work order.

SUSAN

2:08:30 Be completely dedicated to the values... that they need to record. You know, let's say, you know...

SUSAN

2:08:39 They need to... measure.

SUSAN

2:08:43 XYZ value of, you know, these five different things. So you could do that. And then when you, but again, there is a mild inconvenience factor to this in order to edit the, that services list, they would need to go into the tablet view and then key in those values and save that.

--- *Access to information* ---

SUSAN

2:09:05 So that is in my opinion a mild inconvenience. But that would involve them going into the tablet view, doing that and saving that back. Those are the three options. I'm afraid that's all we've got in that regard.

12016387173

2:09:21 So the, for the, so, so my concern with this, the, what I said is that they're going to be on a job site today and they're gonna exit the app.

--- *Forms* ---

12016387173

2:09:34 They're gonna open up the forms. They're gonna fill them out and they're gonna attach them tomorrow. They're gonna go there. They're gonna do the same thing, but we know how these devices work. It's gonna remember the directory from yesterday. So they're gonna upload the forms into yesterday's directory... or they can't find them, which more than likely is what's gonna happen. They don't know where they saved them on a device.

SUSAN

2:10:00 Well, it is not designed to be, is not designed to reopen a partially completed PDF from a previous day.

SUSAN

2:10:15 So, like if...

12016387173

2:10:16 Okay. So maybe I'm missing it. My understanding was it was almost like you have to go, you know, you have to leave service trade, go find the forms. You wanna fill out, fill them out and then you need to upload them into service trade. It sounds like you're saying that service trade will open a form on your device. You fill it out, save it and service trade keeps the lease on it and says this is mine.

--- *Access to information* ---

SUSAN

2:10:47 Yes, it saved to service trade, not to the device.

12016387173

2:10:50 It, okay. That's... that's not what my notes say.

SUSAN

2:10:58 Fair enough. So, yeah, let's see how this goes. So back in the mobile app view... we go down here, view more.

12016387173

2:11:09 My biggest fear is always the, we lose paper.

--- *Paper process* ---

12016387173

2:11:14 It, it happens and it's a giant fricking headache when it happens. Yes. And it's an embarrassment. Quite honestly, we're supposed to be a professional organization and it's like, yeah, sorry, we don't know what happened. It all that, yeah, I know we spent six hours on site and, you know, created all this paper, but we have to come back and do it again.

--- *Forms* ---

SUSAN

2:11:32 It's totally fair. I completely get that. Yeah. So like you're in the mobile app, you're doing your thing, you go to view more details. And then from this screen, you can go in and download the blank paperwork. So, I'm just gonna click actions, download blank paperwork and let's say this refrigerant tracking one... is the form that we're gonna open up?

2:11:56 Now... now, I know you guys can do offline. Can I get that refrigerant tracking offline? Probably not?

SUSAN

2:12:14 Good question because I know that you.

SUSAN

2:12:20 I don't know if that's pre downloaded before you open this or not. I don't believe it.

12016387173

2:12:26 Could I, when I create the job or dispatch the job? Could I attach these forms to the job and say, hey, these are the forms you need.

--- Forms ends ---

SUSAN

2:12:37 Yeah. So that's come over. But what I need to check is to make sure that like, well, actually, why don't I just try this? I'll just, I'm gonna, well, if I turn data off my phone is not gonna display... let me do that for just a second and see what happens.

--- Access to information ---

SUSAN

2:12:54 If it still lets me when I turn data off on my phone... access that information. Okay? This hold please? Okay?

12016387173

2:13:08 Well, you have to turn off the fi and your mobile network.

SUSAN

2:13:12 This is, this is an old phone that does not have any mobile network.

12016387173

2:13:17 Okay.

SUSAN

2:13:18 Use this just for a demo out of her.

--- Access to information ends ---

12016387173

2:13:21 There you go, beautiful.

SUSAN

2:13:23 Yeah.

12016387173

2:13:25 Well...

SUSAN

2:13:25 Of demarcation. All right. So, I'm in here. I click view more details. Yeah, yeah, you can't do it. So you...

12016387173

2:13:33 What I thought?

SUSAN

2:13:34 Yeah, you wouldn't need to do that. You'd have to do that in advance... but...

12016387173

2:13:40 Okay. Yeah. Well, they definitely be able to open them if they're off line.

SUSAN

2:13:49 Has, what I'm saying is you like you would have to reopen the form when they were online?

12016387173

2:13:57 Okay. That's that's an issue... because the buildings we work in are concrete and steel... and a lot of the spaces we are in, we are in sub basements. So, three levels below the first floor, sometimes five levels below the first floor or we're in mechanical rooms that are 30 40 50 stories above the ground and surrounded by equipment and concrete in the building itself.

--- *Access to information* ---

12016387173

2:14:31 And there is no internet or wife I... on, whatsoever in that floor. In order to get access, you have to walk outside onto the roof, wait for your signal to come back. And then you can do your thing. But once you walk inside, you're done and I have a lot of buildings that we don't have service in those spaces. Yeah.

--- *Forms* ---

SUSAN

2:14:56 Yeah. I mean, just me following the workflow with no, it's just not accessible. I'm afraid.

12016387173

2:15:08 In that case, they'd have to be saved on the device.

SUSAN

2:15:16 The device. And then when you go in Adobe, once you have ServiceTrade installed, Adobe says, like, hey, do you want to save this to this folder?

--- Forms ends ---

SUSAN

2:15:26 That folder? One of the options is to save to service trade. But yeah, in terms of accessing it initially, they would have to have all of that stored locally in advance.

12016387173

2:15:42 Yeah. So we just finished a site that we go to for 22 days. One technician goes 22 days... anywhere from eight to 12 pieces of equipment.

--- Deficiencies ---

SUSAN

2:16:10 I mean, I guess, I mean, the big picture thing is like, so, yeah. So that would be an issue. The, you know, the better best options with quoting would be an issue. I mean, I think the big picture this is going to boil down to. Do, you know, the organization, the asset history, the deficiency, reporting, all of that.

--- Deficiencies ends ---

SUSAN

2:16:33 And, you know, just in general, whether that's from us or, you know, other folks because I'm currently not aware of any other folks that do, you know, good, better best quoting options in a field service management tool. So, I mean, it really just balls down to the cost out with the benefits.

--- Purchase decision ---

SUSAN

2:16:58 Yeah. So I mean, I'm thinking it probably makes the most sense for you to kinda, perhaps, you know, take some time to kinda reflect on that. And if, for what, you know, if you decide that this is something you want to continue to explore in light of some of the issues that you mentioned, great, we can continue the conversation.

--- Purchase decision ends ---

SUSAN

2:17:18 If the way you're currently doing things feels better than dealing with some of the obstacles we run into today, kinda keep on keeping on.

12016387173

2:17:32 So, what about with service forms? Just just say that money is no object. Would those be accessible offline?

SUSAN

2:17:44 Yeah, yeah. That's that's totally fine. But yeah, I looked, let's see. Yeah. So each custom form creation generally runs about 3,000 dollars.

--- Pricing ---

12016387173

2:18:04 Yeah. Okay.

SUSAN

2:18:04 Us additional like there's the setup fee for the whole system. You would have to move away from select package into premium to enable service forms. There's an onboarding cost. Like I, for example, I floated out service trade for somebody that has eight technicians and normally eight technicians on service trade. You know, regular select is going to run. You, let's see eight. It's gonna run you like, you know, not factoring and onboarding about... 7,000 dollars like seven.

SUSAN

2:18:49 And...

SUSAN

2:18:50 Like seven, 300. And then when you added, when you added service trade on without onboarding, you know, even, you know, just with like I think you needed like... two custom forms that shot that up to like for those eight technicians to eight. Because I mean, that's just generally why I don't recommend it for folks that need custom forms.

12016387173

2:19:17 But that, that's a one time fee, you know, custom form. Yeah.

12016387173

2:19:29 And I could probably do 90. I could do 90 percent of my business of one form.

--- Forms ---

SUSAN

2:19:35 Okay. Well.

2:19:39 So that's why I asked the question like, well, if the service forms are, if it truly can be offline, if you want, I could share my screen and show you my form here. I know you said you wanted to be done by two, right?

SUSAN

2:19:55 Yeah. You're good there.

--- Forms ends ---

12016387173

2:19:58 Let me open it first. That'll be quicker.

12016387173

2:20:13 He...

--- Pricing ---

12016387173

2:20:29 All right. You see that? That's it.

SUSAN

2:20:36 Okay.

SUSAN

2:20:37 So, this is a totally different coverage. Add this image of you having like 10 really complex custom forms that was gonna cost like 30,000 dollars.

12016387173

2:20:48 So here.

--- Pricing ends ---

12016387173

2:20:59 This is a completed 61 page finished report. You might recognize the address. We don't actually work there. This is what I send the customer, right? So each one of these, the transfer switch, one piece of equipment. And this is, these numbers here... go into that guy to make them the same size.

--- Forms ---

12016387173

2:21:42 Filled out. So that's what it looks like when it gets filled.

SUSAN

2:21:48 I sweet... yeah, that, this is all within our, the per view.

12016387173

2:21:58 It's not a complicated form. You know, we keep it simple. There's and there's things like this information and be dropdown boxes... the manufacturer, dropdown boxes.

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

12016387173

2:22:15 I can, we don't have a model that's the catalog, but this number like I can decode this number just by looking at it. So that can, so I could have like a couple of, so I almost don't need this catalog number. If I have some other drop down boxes, you know what I mean? Same with this stuff just is or a, yeah, nothing?

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

SUSAN

2:22:42 All the type of thing that service forms is on for and there's even the ability to do depends that kind of stuff. Well, yeah, that, well, that very much changes the conversation absolutely. So it sounds like you're liking everything you're seeing if this could be within budget except for, the better best quoting piece.

--- Dispatch ---

12016387173

2:23:02 The quoting thing, is a minor obstacle. I wouldn't consider that to be a major obstacle. The, the way you're, the schedule not having that, was it in your, in the mobile application and the schedule view of the technician, can he see all jobs? Other technicians unassigned et?

SUSAN

2:23:32 You can only see jobs that are assigned to him? If they're not on the schedule, he can see them if they're assigned to him, if they're in the past, assigned to him, if they are coming up in the future, assigned to him, must be assigned to him and the...

12016387173

2:23:45 They, they can only see what's assigned to them.

--- Dispatch ends ---

SUSAN

2:23:50 In the mobile app, if they.

12016387173

2:23:53 An awful at.

SUSAN

2:23:55 Yes. Is there a?

12016387173

2:23:57 What about? So? Yeah... you know, what Google calendar looks like. So... this is obviously the month of April, what we did, but because we're a small shop, there's a fair amount of cross talk between my technicians. So, for instance, this job here that we're going to on Saturday had a baby sister?

12016387173

2:24:38 Where I go? Had a baby sister. I think it was February. I don't know why I can't find it. But so he called up and said, hey, I know you're going there by the way. This is what they're going to be looking for. The guys tend to look at jobs.

--- *Dispatch* ---

12016387173

2:25:01 Sometimes one of them may request a job and say, hey, look, I got something going on. Can I have that job? So like to see them? So like if we look at may obviously we're kind of empty right now, but... these are unassigned jobs here, right? With just a number in them.

--- *Access to information* ---

12016387173

2:25:19 That's how, I know what technicians. So I have, that cross talk happens. So they wanna see what's going on ahead of time. So, they can't see unassigned jobs on the car.

SUSAN

2:25:33 Not within the mobile app, but what folks will sometimes do in this position is they will... create their technicians as office users, and they can log into the office view and see that calendar view and see what's coming up and who's got what. And even if you wanted to, you could even give them the permission to unassign and reassign that's. Kind of a whole can of worms.

12016387173

2:26:04 No, they don't need to do that.

SUSAN

2:26:08 But yeah, in a word, in order to see everybody else's schedule, they would need to log into the office view... of.

12016387173

2:26:19 The mobile app, even like, if I had the mobile app, I can as an administrator and owner, I don't I still can't see the whole schedule.

SUSAN

2:26:29 No. There's there's nothing in the mobile app. It's gonna give you, the whole absolute schedule for everybody. It's only showing you what is assigned to you in the mobile app. But, you know, in terms of, are most of your guys on phones or are they on tablets?

12016387173

2:26:50 Well... I have a box of brand new iPad sitting in my office from that I bought last year.

SUSAN

2:26:59 Well, well, there you go. I mean, so I mean, that's the nice thing it's like. I have a tablet that service trade and I have a phone that service trade. So if they ever, you know, if it's too small to see the office stuff, you know, they could have be logged into, the office view of service trade and see that.

12016387173

2:27:19 All right. What about, what about customers? Does the mobile app allow them to see customers or only customers that they've been assigned to?

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

12016387173

2:27:32 How far back can you go? So, for instance, you know, my less experienced guy, my new guy, well, might call up a senior guy and say, hey, listen, I'm at this site and they told me that there's a problem with the switch. You were here last. What do you know?

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

12016387173

2:27:52 And he'll go. I don't remember, they could look, they could open up, right? They could open up that job under that customer and look at what they did and go. Yeah. Right. Can he do that in the mobile app?

SUSAN

2:28:07 He can go over to his completed appointments and scroll back as long as they need to.

12016387173

2:28:13 A year, a year, two years, five years.

SUSAN

2:28:18 Yeah. The history of service trade?

12016387173

2:28:21 What if he didn't go, someone else went and he gets the same call. Listen, I'm having a problem. I need to, they said that one of us was here. I don't know who, you know, Frank is not available. Can you help me out? And kind of in a pinch, can he see that customer or no?

SUSAN

2:28:38 What he could do though? Is that okay? Like let's say John is out there and it's like, I don't know what's going on. They said like we've been out here before. So they would go into, you know, that, you know, remember how we can like access, you know, history through the asset. They can go in the work order, and... I believe, let me double check on this. I go.

--- Access to information ---

12016387173

2:29:05 But not through the app. They have to log in. They have to log in as an office user.

SUSAN

2:29:10 That's what I'm curious about because I'm wondering if the app would support this. Hang on one second. Let me check. So if I go in here to... would help, if, I can turn my wife back on... a worker, I sell this product on, turn on the internet, like there's a sent her like this app, connect to the wife. So we'll go in?

SUSAN

2:29:40 Here?

SUSAN

2:29:41 Nope. Don't want that. Yeah, on this one and then asset, this asset service history completed.

SUSAN

2:29:57 Click on that job.

--- Assets ---

SUSAN

2:30:08 Yeah, it would tell you would go in, click on the job, the old job and then.

12016387173

2:30:14 He wasn't assigned to it.

SUSAN

2:30:16 So, he goes through the asset through the history, see the, you know, the previous jobs that were worked on it. And then from there, see what the asset technician was call them.

12016387173

2:30:28 So in the mobile app, he can essentially scroll through all the customers.

SUSAN

2:30:34 No, you, the way that you would access that is okay. So, like imagine your onsite and there's the switch. And so, you know, he needs to talk to somebody who's worked on this switch before he would go into that switches asset history, go to service history, look at the most recent job who worked that most recent job. It was Ted, let me call Ted.

12016387173

2:31:00 Okay. Tests, not available.

SUSAN

2:31:02 Possible in the...

12016387173

2:31:04 Right. What if Ted is not available, heads on vacation in rube, okay?

SUSAN

2:31:12 He...

12016387173

2:31:15 And, and he's asking for help from another senior technician who could help him, but that technician didn't work on that asset has never worked on that asset. And... I...

--- *Access to information* ---

SUSAN

2:31:30 That's the case for going into the office.

2:31:38 Say that one more.

SUSAN

2:31:39 Time. So that would be the case for going into the office view of the tablet.

12016387173

2:31:44 They have to go into the office view.

12016387173

2:31:50 So the app is really only functions as the day to day clipboard. It just replaces their clipboard.

SUSAN

2:32:01 I think we're a bit more robust now that I'm thinking about it than a clipboard, but functional.

12016387173

2:32:08 Well, yeah, because he's so he's assigned that job. He has access to every job that's ever been created for that customer regardless of who did it.

12016387173

2:32:29 Through the app?

SUSAN

2:32:30 The app?

--- Access to information ends ---

12016387173

2:32:31 The app is valuable.

SUSAN

2:32:34 Yeah, just what that person has done in terms of, you know, what's gonna pop up there. But again, once you get into that asset view, that's where you get that Rich history of who cares, who did it when, right? And just push to next? I mean, my two o'clock was pushed to next week. So we're good. But yeah, any other concerns from last time that we didn't address?

--- Tech On-site ---

12016387173

2:33:13 Have a question. I have a bunch of question marks about work acknowledgement. Does technicians now? So... I guess this kinda goes back to our discussion. I don't know, if I asked the final question or if you didn't if I wasn't listening when you answered it. So, when I put something on the schedule, I assign a technician to it... they get an email notification that they were assigned a job.

--- Tech time tracking ---

SUSAN

2:33:51 If it's within eight hour, if it is within eight hours because it's generally designed for folks to live out of that app. So, you know, it's not going to email them and be like a job is added to your schedule two weeks from now because we want people to be kind of basing their day off of the.

--- Dispatch ---

12016387173

2:34:12 Well, they get an alert like so eight hours seems like a strange number to pick. So for instance, you can see, and since I'm still sharing, so here's today, right? I've assigned all these jobs for the weekend. Now, I, and, you know, overnight, I assigned them all Monday, I put, I assigned all these names and even these jobs kind of ads are assigned already to a small extent.

--- Dispatch ends ---

12016387173

2:34:43 So the app will notify him... tomorrow. This is set for 11 o'clock at night. So at two o'clock tomorrow afternoon, he's got, he will get a notification that he has to be on site.

SUSAN

2:35:00 I'm going through, I'm just confirming.

12016387173

2:35:03 I just, I wanna understand how it works because I'd prefer that if I put, if I like for instance, this says JB right now, if I change this... right to myself and click save, let's just say that there's another Tom out there.

--- Dispatch ---

12016387173

2:35:21 Another. TC, he gets a notification that he just got assigned a job. And John gets a notification. He's been unassigned a job, right?

SUSAN

2:35:32 Okay. So from just to make sure I get this super correct. So the time window where in a modified appointment will trigger an email assigned to a technician is defined as this window of time beginning last midnight or extending this coming midnight or eight hours after the time of the appointment change, whichever extends later actions that trigger this email is moving an appointment into out of or around the time window defined assigning or moving tech to or from the appointment scheduling and assigning a tech to an appointment within that window described above or releasing or UN releasing a technician scheduled appointment within that.

--- Tech time tracking ---

12016387173

2:36:16 So if it's outside of eight hours... and nobody knows about.

SUSAN

2:36:21 They need, they need to be, I would say most of our customers, their technicians check their app... basically every day that they could potentially be working.

12016387173

2:36:33 Of course... strange design choice.

SUSAN

2:36:42 I didn't write it.

12016387173

2:36:45 A snap.

SUSAN

2:36:45 My fingers, I do push notifications.

12016387173

2:36:50 You know, not only should there be push notifications, is if a technician is assigned a job, he should be, he should be told, it doesn't matter if it's in one hour, 10 hours, 10 days, 10 months, he should be notified period. And the discussion there's no reason to assign any kind of time period to it. Why, why would there be a time period? He's only, he's only told eight hours that's a day that's it's less, it's a quarter of a day. Why are we telling people quarter?

SUSAN

2:37:28 The beginning last night thing would help a little bit with the ad that would extend it past eight hours in some situations, but that's getting into the weeds a bit. But yeah. So that's how that works.

--- Tech time tracking ends ---

_{2:37:41} You know, because it's written that's written as when you asked me, one of the first questions you asked me is, are we reactive or proactive? That eight hours that's reactive that's for a reactive organization, that all they want is eight hours. So when they open their doors at six a.

--- Dispatch ---

12016387173

_{2:37:58} M, they start assigning their tax and everybody gets notification on their today's jobs as they wake up right? To get clock in the morning. Yeah.

SUSAN

_{2:38:10} I think their thought process behind that is the idea that people live out of, you know, their app for doing work becomes service trade. So they're constantly looking at it and they can see every.

12016387173

_{2:38:24} You're only giving them, but the app only gives them a day. They can't even, if I had the app today, my guys can't see Saturday's job. No, they can.

SUSAN

_{2:38:33} If it's scheduled, they're just not going to be notified about it. They can see it. Okay? Yeah.

12016387173

_{2:38:38} So, when I assigned it on Monday, they can see, so on Monday, they can see what they were assigned that job.

SUSAN

_{2:38:46} Sorry. Yes, yes, yes, they can. If you assign them a frigging July, they could see it.

12016387173

_{2:38:56} Okay. Well, that really doesn't okay. That's okay. Then.

SUSAN

_{2:38:59} Sorry, I thought we're like really focused on the notification portion of it, but in terms of seeing it in the list of everything they have, if it is assigned to them and.

--- Dispatch ends ---

12016387173

2:39:07 Yeah, that's you know, it's just an extra step because, you know, what I currently do... here's, what I currently do.

12016387173

2:39:24 I take this page, which is our service call sheet and I print it in paper. I take a picture of it with my phone and I text it to the technician or in this case, technicians that are assigned... one of the 16 pages that goes out to the field.

--- *Assets* ---

SUSAN

2:39:47 Yeah.

12016387173

2:39:48 And so we're full circle... they return with that page number 16... which gets scanned and put into our archives... that we're pretty well organized in our Dropbox. So, like I talked about my publication library, this is all the manuals drawings pictures... of things that we've collected... over the years... all the different brands of stuff that we work on, you know?

--- *Assets ends* ---

SUSAN

2:40:34 No.

12016387173

2:40:37 33 years worth. So... yeah. So I have a good system and these are my customers, right? We talked about my oem. So here is add a, you see that?

SUSAN

2:40:52 That...

12016387173

2:40:52 That's how I mark who owns this account. So down here here's, my other guy, hope, right? Their account. So, when I Bill that in Quickbooks, I know who I'm billing for that account.

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

SUSAN

2:41:10 Gotcha. But, yeah. So you asked about work acknowledgments though, are you talking about like onsite?

12016387173

2:41:26 Yeah, I guess like, how do I know they're done onsite?

SUSAN

2:41:33 Because it's the...

12016387173

2:41:34 It...

SUSAN

2:41:34 Changes from scheduled to.

12016387173

2:41:38 Just a status change and the, on the dashboard?

SUSAN

2:41:42 As a SaaS page within that job, I mean, the sas changes within the job.

--- Dispatch ---

SUSAN

2:41:45 And then on the dashboard, it would go under jobs to be marked complete. So it's basically setups for the technician to go out, do their work, gather data, do their thing. And then when they, after it's done, then that goes into that bucket for you to review everything. Then once you market complete, it goes in a bucket that says job completed jobs to be invoiced.

--- Access to information ---

12016387173

2:42:10 Right. And if they're connected to the internet, everything's updated in real time.

SUSAN

2:42:15 Yes. Yeah. All the, all the data like, you know, if they put in a comment, if they took a picture, all that stuff like that's, gonna be stored regardless of whether or not that's gonna get stored locally, regardless of internet access. And the second they connect back to data, it's gonna sync right back up.

--- Deficiencies ---

12016387173

2:42:34 Right. Do that part? I like because they could work on something while they're in the app, you know, send me a quick text or get on the phone with me and just start

snapping pictures. And I go, no, I don't like that picture. Take a different one. All right.

--- *Access to information* ---

12016387173

2:42:48 I can see that. I don't see this, take a, you know, like that's. Huge. We do that now through text and phone call. You know, I still can't get off samsung personally, but everybody else has iphones... and obviously, we're going to.

SUSAN

2:43:06 I get it.

12016387173

2:43:07 I get it. I know the...

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

SUSAN

2:43:10 That's another thing with service trait. There's no data limits like every single technician if they wanted to. I would not advise us for obvious reasons. Can we're gonna take a 30 second video of something that's going on and it's not gonna get compressed... data... right? Yeah, work authorization.

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

SUSAN

2:43:30 I mean, that's so that's super simple like in terms of getting a signature from onsite, that's just you get you click the great work acknowledgement button, and then you go through whatever you need to go through with them. They toggle teas and sees the finger sign job done. Let's sync back up with the work?

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

12016387173

2:43:48 That already exists correct?

SUSAN

2:43:54 Yeah. That's just like one of the final steps. And as a part of, if that's something that's needed before they clock out, they just do that then.

SUSAN

2:44:09 Yeah, I'm thinking and you tell me, you know, it sounds like you're liking a lot of what you're seeing, there are a few things that would be adjustment, but that's gonna be true with everybody, I'm thinking it would probably make sense for me to

send you some like a high level overview of service forms. And if you wouldn't mind replying to that because I can't get you a quote until we figure out service form stuff that sounds like a pretty mission critical piece. If you would reply to that with and, you know, block out any proprietary stuff you're not comfortable sharing with a sample form, that one that would apply for 90 percent that you'd want to get scoped out. I can work on, my end to have a discussion about that... and we can kinda pick it up from there, if that makes sense. Yeah. Sweet. All right. Well, let's do that. I'll send you that information addition to like... a few other like little helpful articles onboarding, Quickbooks, all that I'll dig around... for?

SUSAN

2:45:27 Yeah. Can, can we disable adding new parts and then we figured out the start point from the map and we'll be good to go. Okay. Any other last minute questions I can address before we hop off?

12016387173

2:45:49 No, I think I got, I took as many notes as I can.

12016387173

2:46:01 But it for a little while and yeah.

SUSAN

2:46:07 Yeah.

SUSAN

2:46:07 I'll get that over to you and I'll send you. Yeah. So once I have that sample, I can get you a more accurate quote for service forms. And then after that, we can... you know, just continue the conversation. Okay. Awesome. Well, I enjoyed spending my midday with you and we'll be talking soon.

12016387173

2:46:37 I appreciate your time, Susan. Thank you so much.

SUSAN

2:46:40 Thank you. Have a good one.

12016387173

2:46:42 You too. Bye bye.

The End