



# ServiceTrade Demo with JMS

Meda Piner with JMS  
Recorded on 1/31/24 via Zoom, 1 hour 20 min.

## Participants

### **SERVICE**TRADE

Meda Piner  
*Territory Manager*

Jace Stephenson  
*SDR*

### **JMS**

Joe Ferrer  
*Customer Service & Support Manager*

# Topics

|   |       |
|---|-------|
| <i>Paper process</i> .....                      | 2:24  |
| <i>Accounting integrations</i> .....            | 4:33  |
| <i>Customer engagement</i> .....                | 7:26  |
| <i>Type of work</i> .....                       | 8:05  |
| <i>Quote templates</i> .....                    | 8:28  |
| <i>Type of work</i> .....                       | 9:41  |
| <i>Paper process</i> .....                      | 10:13 |
| <i>Purchase decision</i> .....                  | 11:08 |
| <i>Paper process</i> .....                      | 13:07 |
| <i>Assets</i> .....                             | 14:27 |
| <i>Paper process</i> .....                      | 16:38 |
| <i>Deficiencies</i> .....                       | 18:19 |
| <i>Pricing</i> .....                            | 19:35 |
| <i>Type of work</i> .....                       | 19:56 |
| <i>Customer engagement</i> .....                | 20:34 |
| <i>Recurring maintenance</i> .....              | 21:32 |
| <i>ST app contracts and pricing</i> .....       | 21:46 |
| <i>Type of work</i> .....                       | 22:01 |
| <i>Type of work</i> .....                       | 22:57 |
| <i>Parts management (inventory)</i> .....       | 24:25 |
| <i>Parts management (purchase orders)</i> ..... | 24:43 |
| <i>Quote templates</i> .....                    | 25:01 |
| <i>Access to information</i> .....              | 25:23 |
| <i>Assets</i> .....                             | 27:17 |
| <i>Forms</i> .....                              | 27:41 |
| <i>Customer engagement</i> .....                | 28:23 |
| <i>Quoting</i> .....                            | 29:18 |
| <i>Dispatch</i> .....                           | 30:25 |
| <i>Access to information</i> .....              | 33:48 |
| <i>Recurring maintenance</i> .....              | 34:35 |
| <i>Assets</i> .....                             | 34:57 |
| <i>Implementation and ongoing support</i> ..... | 38:40 |
| <i>Recurring maintenance</i> .....              | 39:00 |
| <i>Assets</i> .....                             | 39:45 |
| <i>Access to information</i> .....              | 41:32 |
| <i>Deficiencies</i> .....                       | 42:10 |
| <i>Assets</i> .....                             | 42:40 |
| <i>ST app contracts and pricing</i> .....       | 43:03 |
| <i>Quote templates</i> .....                    | 43:40 |

|  |         |
|--|---------|
| <i>ST app contracts and pricing</i>                | 44:03   |
| <i>Type of work</i>                                | 48:09   |
| <i>Quote templates</i>                             | 48:31   |
| <i>Parts management (inventory)</i>                | 49:13   |
| <i>Parts management (purchase orders)</i>          | 49:53   |
| <i>Access to information</i>                       | 52:08   |
| <i>Tech On-site</i>                                | 53:25   |
| <i>Tech time tracking</i>                          | 53:43   |
| <i>Assets</i>                                      | 54:00   |
| <i>ST app contracts and pricing</i>                | 54:19   |
| <i>Forms</i>                                       | 54:34   |
| <i>Assets</i>                                      | 54:50   |
| <i>Parts management (purchase orders)</i>          | 55:10   |
| <i>Parts management (inventory)</i>                | 55:31   |
| <i>Accounting</i>                                  | 56:13   |
| <i>Quote templates</i>                             | 56:36   |
| <i>Assets</i>                                      | 56:58   |
| <i>Deficiencies</i>                                | 57:41   |
| <i>Deficiencies</i>                                | 59:12   |
| <i>Deficiencies</i>                                | 1:00:23 |
| <i>Assets</i>                                      | 1:01:16 |
| <i>Deficiencies</i>                                | 1:01:31 |
| <i>Access to information</i>                       | 1:02:06 |
| <i>Access to information</i>                       | 1:03:06 |
| <i>Tech On-site</i>                                | 1:03:30 |
| <i>Customer engagement (quoting and invoicing)</i> | 1:04:31 |
| <i>Quote templates</i>                             | 1:05:13 |
| <i>Tech On-site</i>                                | 1:05:38 |
| <i>Paper process</i>                               | 1:06:19 |
| <i>Tech On-site</i>                                | 1:06:39 |
| <i>Deficiencies</i>                                | 1:07:57 |
| <i>Quote templates</i>                             | 1:08:38 |
| <i>ST app contracts and pricing</i>                | 1:09:52 |
| <i>Accounting</i>                                  | 1:10:20 |
| <i>Quote templates</i>                             | 1:10:41 |
| <i>Customer engagement (quoting and invoicing)</i> | 1:11:05 |
| <i>Quote templates</i>                             | 1:11:57 |
| <i>Customer engagement (quoting and invoicing)</i> | 1:12:18 |
| <i>Quoting</i>                                     | 1:12:37 |
| <i>Quoting</i>                                     | 1:13:26 |
| <i>Parts management (purchase orders)</i>          | 1:13:45 |
| <i>Dispatch</i>                                    | 1:14:19 |
| <i>Tech On-site</i>                                | 1:14:36 |
| <i>Tech On-site</i>                                | 1:15:10 |

|  |         |
|--|---------|
| <i>Invoicing</i> .....                                   | 1:15:41 |
| <i>Customer engagement (quoting and invoicing)</i> ..... | 1:17:06 |
| <i>Customer engagement (quoting and invoicing)</i> ..... | 1:17:42 |
| <i>Purchase decision</i> .....                           | 1:18:11 |

# Transcript

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

MEDA

0:00 Hi, how are you doing? I'm doing good.

JOE

0:01 Good. How are you doing? Can you hear?

MEDA

0:02 Me? Good. I can. Let me try to.

JOE

0:06 It one like a camera. Okay?

MEDA

0:11 Awesome. Well, thank you so much for joining. My name's, Meda. I'm a territory manager over here at service rates. So I'll be your point of contact from here on out kind of taking you through the whole thing. I do want to start off a little bit more about your business. I mean, jase gave me a good bit of notes and you were at the conference, is that correct?

JOE

0:32 What? Yes, ma'am, I was.

MEDA

0:34 Awesome. How was that?

JOE

0:36 It was a long day.

MEDA

0:38 Yeah.

JOE

0:39 A lot of walking around, but it turned out really good. So.

MEDA

0:42 Yeah, yeah, I remember... a, I was gonna say back in the day, it really wasn't that long ago back in my old job, I did the conference circuit and was always going there. And it is, I mean, it's a beast you're exhausted at the end of it and imagine that with heels on and you're done. You're you're absolutely dead. So, I appreciate you kind of, did you stop by our Booth? Is that how you found us? Or did they corner you?

JOE

1:11 Yeah. We, we intentionally went on the premise. So, trying to find a software for our service department, so.

MEDA

1:18 Love that. Who else did you find? Who's my competition?

JOE

1:31 Hold on one second. No, you're all good.

JOE

1:37 May be seeing it wrong?

MEDA

1:40 No, I see it, PX, the.

JOE

1:44 Opera operix, opex, how are you saying that? I'm not, maybe I'm saying it wrong.

MEDA

1:52 I won't, hold you to it. I've never heard of it honestly. I...

JOE

1:56 Am the BuildOps?

MEDA

1:58 Yeah. Heard of them. Cool. Awesome. So you done demos with them as well?

JOE

2:04 Just the opera one. Okay. How'd that go doing good? There was a lot of features that I was looking for that they had embedded, okay from a service type mentality. So, but, you know, got to do my due diligence and check all you guys out. So, I...

--- Paper process ---

MEDA

2:24 Absolutely cool. So, what were those things that you need to have? What are those features things that you want?

JOE

2:31 You know, the biggest thing is trying to have a centralized feel to everything. We're a smaller company, but... I wear many hats. So service technician, I'm not just a service manager but I'm on the collections, I'm billing, I'm perfect. Quoting, everything. So, yeah, sometimes trying to have, I get towed on, get too many posted notes and, you know, do like Joe, you know, you got, how do you keep it all in play? And I'm it's in my head which that's what I don't want, right? I don't have it all just head or on a piece of paper or a notebook or, you know, the software that we use right now, it's antiquated. So... there's a lot of... potential efficiencies that I'm looking for. Okay?

*--- Paper process ends ---*

MEDA

3:33 Cool. Awesome. Anything that stuck out from your demo that you're like, my god, this is a game changer like this is a great feature.

JOE

3:42 From you guys or from the.

MEDA

3:44 No, I want to talk about them first. And then...

JOE

3:47 Yeah, some of the demo that I was looking at primarily on the financial aspects of each service ticket, it showed, you know, where, you know, how much my, you know, either my ticket was making or, you know, the gross margin on it in charge, all that good stuff that was good. But I think, the biggest thing that I took away from it was the centralized piece because it showed... so like my service rates. Okay. He asked me, he goes. So where do you keep your service rates? And I said, well, it's on a word document and a folder whatnot and he goes, how would you like it to be here to worry?

*--- Accounting integrations ---*

JOE

4:33 It's easily found and it incorporates when you create a proposal, you already know that customer has maybe a reduced rate and it's already joined in. So I thought that was really cool.

MEDA

4:47 Yeah. Absolutely. Cool. We can, we can definitely do that. Now. What are you, what are you all using for accounting?

JOE

4:54 So, we're using Quickbooks that's kind of the biggest thing to make sure that it's integrated into. Yeah, that's the account of software that we have and the service software we use as SmartService. Yeah. And I know SmartService has newer, I'm sure newer software organizations and whatnot, but just using, the tool that the company has been using probably for quite a while.

--- Accounting integrations ends ---

MEDA

5:25 Just...

JOE

5:26 Hasn't been. It's worked. Yeah. But I think there's more like I said efficiencies that can be utilized.

MEDA

5:37 Yeah, totally makes sense. Okay. So let's pivot to your current process. So we've got paper golore, we've gotten in our head, talk me through while one, let's pause. You do a lot of PMS?

JOE

5:51 We're trying to kick them up. Not very many. We've only got four... service agreements that we do, but we have one particular account that's very large a okay, not considered one, but it is. And yeah, that one in itself is pretty large.

MEDA

6:13 So, like a university of sorts or something that just happen.

JOE

6:17 Its like...

MEDA

6:17 20 hundreds, it's a school district cool.

JOE

6:20 Cool.

MEDA

6:21 Do they have certain requirements for you guys in terms of documentation? I'm from the school district teaching with, my old gig. So, I know a lot about, that thing and I know they're kind of particular about some documentation. Do they?

JOE



6:36 Yeah, for sure. Okay. Yeah. And, and probably to the point to where they haven't really pushed us even more to provide, which I'm very surprised because I think... even though they're huge, they're still probably doing on a lot of antiquated things themselves.

MEDA

7:02 That's the school.

JOE

7:04 Yeah. And I'd almost like to be ahead of that curve, right? Yeah. Be ready to where if they decided they want it, man, I can provide anything. Yeah. Right now, I have to go through emails, sort through folders and provide well here's. The proposal I sent you. I want that proposal that I provided them to be in a centralized location within the software.

*--- Customer engagement ---*

JOE

7:26 So that way I can just pull up the customer shows all the proposals. I've done maybe by school or by whatever, and it's quick and easy to do. Yeah.

MEDA

7:37 Yeah, absolutely. And not only that it's make sure we retain that account because I'm assuming they give you guys, a lot of money for that account. So just by supporting them better, being a little bit more customer centric in our processes, whether that's you know, hey, heads up, we're on our way or just, you know, a recap of the day, things like that, something a little better than just saying, hey here, pay this invoice that's how you're going to retain those customers, and grow.

*--- Type of work ---*

MEDA

8:05 And then the word of mouth is spreading. They're like, my god, Joe is amazing. His team is great, you know, which I'm sure you already are. I don't mean to say that you're not already... but cool. Cool. Awesome. Yeah. So what... I'm curious about the other software and how they handle and grow preventative maintenance. Did they have a contract piece and things like that?

*--- Quote templates ---*

JOE

8:28 Yeah, they did. Okay. They had, a software or part of their demo was showing the agreement side. The part that I thought was pretty cool was they had a section in there that showed the proposals and actually created a proposal based on certain criteria, customize areas to where you can make it tailored to where a lot of its generic template. So that, you know, from a service mentality, it was very good.

--- Quote templates ends ---

MEDA

9:04 Quick and easy. Yeah, absolutely cool. Okay. Well, I think you're gonna like what you see today, everything that you've talked about so far we do and we do it really well. I would say our biggest focus at ServiceTrade is the PM agreement making sure we don't miss any of those jobs, any recurring service. And then on top of that, it's just kind of asset management. From there, we're really big on keeping that history because I'm sure right now, what is it in your head?

JOE

9:32 Your papers? Yeah.

MEDA

9:35 Yeah. It's it's all over the place.

JOE

9:37 So, and you can?

MEDA

9:39 Guys are looking to hire, right?

--- Type of work ---

JOE

9:41 Yeah. So, right now, like I said, we're a small company, but I have two dedicated technicians on the service team looking for a third one here in the next few months. But I have the rest of the company at my disposal when we need to run calls or we get hot and heavy. It's it's not like I'm just teetering on just a E, yeah, people at my disposal... but yeah, if you...

--- Paper process ---

MEDA

10:13 If you need to take a call, please take it. I know you're running the business. Okay, cool. Well, yeah, I mean, as you grow, you're gonna have to have a software in place. You know, you're gonna have to have streamline processes and things like that. I mean, it not only makes it attractive for the texts to come work for you but it makes your job a lot easier because those texts aren't going to have that knowledge that you have.

--- Paper process ends ---

MEDA

10:35 They can go on their phone, see all the service history, see what went down, make that repair and replace conversation without, you know, calling you, you're digging through your photos, you're digging through documentation like whatever that is just giving you time back in your day to actually run the business instead of working on the logistics of everything. And granted, right there's gonna be some of the logistic work that you have to do, but let's give you time back in your day to go stop putting out silly fires and, you know, put out big ones. So that was a terrible explanation but I think you've got it.

--- Purchase decision ---

JOE

11:08 I got a, I got what you're saying. Cool. Great.

MEDA

11:11 Cool. Awesome. And then in terms of a timeline, summer is coming up, well, not pretty quickly but it's right around the corner. I'm assuming you guys wanna get something before that?

JOE

11:25 Yeah. You know, another thing that the owner was asking that a Joe talk to these guys first. I'd like to talk to them as well after that. You know, we typically have a managers meeting every week and, he wants to be involved with that because, you know, he asked me about how much the other company costs. I said, well, Jim, I'm gonna let you ask those questions since you're the one who's gonna pay the Bill for it. So, I'm here to kind of make sure that it's what I need and it handles everything, on an everyday basis. So.

MEDA

12:03 Yeah. And I think that process is really good. Not that you guys are gonna have a sticker shock by any means, but you could right? Like let's build the value. Let's make sure we check off the boxes before we're like no price we're out.

JOE

12:16 Yeah.

MEDA

12:17 So, totally cool. I love that idea we are recording today. So if you want to send this recording to them, that's totally fine. I'm also fine doing this again. I don't have to run through, you know, all the questions about the business too. I'll have a good idea about what's important. Anything that's important to your owner that I should know or any other key stakeholders in this?

JOE

12:38 You know, I think the biggest thing is he's trying to make sure it's more streamlined and efficient for me. He's been kind of, you know, make sure that he's been pushing me to try to find one. I've looked, I've talked to some, but I think going

to the Chicago show was really the focus for me because he knew he's been doing it for so many years and he goes, I know you'll find something or at least you'll get interested and then we can spin off from there.

*--- Paper process ---*

JOE

13:07 So, I think the biggest thing is free of my time, be more efficient. He knows what we got antiquated, something that can encompass everything, that I do on a regular basis. And, you know, just be user friendly as much as possible.

MEDA

13:23 Yeah, yeah. Absolutely. Cool. So... sorry, can I kick out my dogs? Do you mind?

*--- Paper process ends ---*

JOE

13:30 For a second. Hey, go ahead.

MEDA

13:31 It's it's their enemy, the fedex driver.

JOE

13:33 No, you're fine.

JOE

14:02 Sorry?

MEDA

14:02 About that. I have a Springer spaniel in and as, and they're both under three?

JOE

14:08 No, you're fine.

MEDA

14:09 Lovely time. Cool. I appreciate it. Anything else I need to know that's important. I feel like you gave me a good rundown.

JOE

14:16 I do have some questions that I opposed to the other company as well that I've kind of written down and I was gonna ask you perfect.

*--- Assets ---*

MEDA

14:27 And...

JOE

14:27 That way we can talk about it as we go through the presentation and whatnot, yeah... one of them you actually already hit on was the assets. You know, we have so much equipment out there almost kind of like a, you know, how you would define hvac and condensers and units that are being installed.

--- *Assets ends* ---

JOE

14:47 We, we equally do the same with because we're control systems integrator, you know, we have controllers at that. When we install. We need to make sure we track when that was done because some of those controllers actually have license bound to it that sometimes they will expire on, some of the, that is required of it. And so, it'd be nice to be able to track. Okay, this is installed this date. We know 18 months from now. It's going to expire. I need to be able to run a report from that as an asset and see exactly, okay, these are about to come up. Let me hit up to question at that kind of thing. Yeah. So assets as one. The other one of course was chicken the financials of each service ticket, see where we stand. That helps me to understand whether or not, I apologize. So I'm getting blown.

MEDA

15:48 Please take it if you need to.

JOE

15:50 No, it's fine. They can wait... you know, to track my financials to either determine maybe I didn't put enough hours in or maybe it's taking the technician longer to accomplish or complete that work order to the development of their skill set. So, tracking financials is a big thing. Another thing we talked about is the proposals and price quotes, being able to centralize that in the software to where if I provide something, I can put that as an attachment to the work order or the customer of that specific one. Also, is there an app for my technicians out in the field that they can download and do their service tickets and that can be utilized.

--- *Paper process* ---

JOE

16:38 Yeah, you know, the SmartService, it doesn't a, I know that sounds silly, but it O, it does help. SmartService doesn't have an auto correct of a spelling, you know? So when my guys turn in their tickets, they send it via e-mail through a summary. I get it. I have to review it, but I've got to make a lot of corrections on it sometimes. Yeah. When I paste it into SmartService, it doesn't do any of that. I've got a, okay. I've got to correct it outside of that before I copy and put it into, the software. Yeah, it's very cumbersome on that. Yeah.

MEDA

17:15 Yeah. As, as a fellow bad speller, I get it, absolutely, no worries.

JOE

17:22 We could do that, need to be able to run reports, open tickets, completed tickets, call back warranties.

JOE

17:36 Another one was recommendations. So, you know, another way to kinda that we always strive to do is pull-through work. So whenever my guys provide a ticket, I'd like to have a recommendation of what they told the customer and then maybe run a report or have it extract out from the ticket. So that way it's just optimizing. I know to follow up on it from my.

*--- Paper process ends ---*

MEDA

18:04 Yeah, yeah. I would say you just hit on our other biggest point. If you guys didn't pull, do, pull through revenue. I probably would be running out of here with my hair on fire and screaming why because a lot of folks leave that money on the table, right?

*--- Deficiencies ---*

MEDA

18:19 So whether that's a repair that we got caught out to do or my tech just notices it in the field, we need that documented, right? That also hits on that customer centric piece of we're gonna do right by you. We're gonna show you what repairs that are needed. And then we're going to categorize them of a recommended repair, something that's deficient, something that's completely inoperable, so we're going to stage those to be like, hey here's, all your repairs. Maybe these two are recommended. This one maybe doesn't need to be done right now, but we want to give you a heads up that, we have some concerns with this piece. So, absolutely cool. All right. Anything.

*--- Deficiencies ends ---*

JOE

18:59 It right now. So I think I hit you up with quite a bit of stuff, so.

MEDA

19:03 You did. And honestly, I'm very excited to show you this. This, this is gonna be a home run for you guys. So perfect. Well, I hope so. I mean, I shouldn't count my chickens yet, but let's jump on in here... here. My eye that's the dogs for you. Let me share my screen with you. We'll keep this super conversational, if pause me. If you have any questions, I'll hit on your high points. Do you have a hard stop time? I need to make sure I keep this under.

*--- Pricing ---*

JOE

19:35 Yeah, probably four o'clock four.

MEDA

19:37 Okay. Sorry, I was about to say 417 now, but I'm assuming you're not on the east side?

JOE

19:42 Yeah, yeah. I'm 317 right now, so.

MEDA

19:45 Okay, perfect. We'll we'll get going. Awesome. So I'll start off with background about us and I should have asked you this earlier. You're 100 percent commercial, right?

--- *Type of work* ---

JOE

19:56 Yeah, we don't do any kind of residential whatsoever. And so.

MEDA

20:00 Yeah. Well, since you say that, I feel like I have to give my spiel, we will never cater to the residential market that's not our niche. You guys can do light residential work in here, I mean, but if you told me you were 90 percent residential is?

JOE

20:16 Yeah.

MEDA

20:16 The, the door would close, yeah.

JOE

20:18 No, so.

MEDA

20:20 Cool. You're in the right spot and this data is a little bit old, but we have about 1,400 active customers servicing about 12 percent of all commercial and industrial buildings and accounted for about 13,000,000 assets under our management.

--- *Customer engagement* ---

MEDA

20:34 So our whole goal is to control cost and grow quality revenue. We're gonna do this by improving your service project, operations, setting up your tax for success, and then in turn being able to sell more agreements and grow that profitable customer loyalty. So the things that we're going to focus on today, this is our profit platform. We're going to focus on office coordination, technician, productivity, customer communication and management visibility. Now, there is a sales success piece to this. We're not gonna touch on that today. Just know we have a lot of offerings under our umbrella. We have a sales tool. We have a full inventory tool, all of those kind of things that add you guys grow will grow with you.

--- *Customer engagement ends* ---

MEDA

21:17 So we've got a lot of offerings. If you all ever need anything else, you know, let us know. But to focus on core service rate for the office, you guys will have everything that you need to manage and execute on your service agreement work. So pm's are really big for us.

--- *Recurring maintenance* ---

MEDA

21:32 So automatically creating those work orders when that work is due, we're essentially using them as a set it and forget it. We're going to set it once and then it's going to populate quarterly annually or however often we need to do that service. So you never miss it.

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

MEDA

21:46 We're also going to summarize the profitability and then of course, we've talked about this earlier PM management huge. You're gonna hold your contracts in there. You're going to renew those contracts and you're going to have all these type of tracking and rules that you can have with that.

--- *Type of work* ---

MEDA

22:01 So really everything from dispatching to invoicing for your service work. We're covering, do you guys do any kind of longterm projects?

JOE

22:11 We do. Okay. So, you know, I encompass the, I always like to call it the trifecta service, you know, service agreements, TAM, and... service projects, but, you know, we have an operation side that handles longterm projects, shortterm projects, standard Construction department.

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



JOE

22:35 That would that. So, so yes, they don't use what I use. Everything is done through I guess an excel type format that a, that the owners have been using to forecast their jobs and what not?

MEDA

22:53 Okay. So they're not on like ProCore or anything like that?

JOE

22:57 That we're...

--- *Type of work* ---

MEDA

22:57 All on. Okay. Got you. All right. Well, we'll keep the project side with them then and the large projects.

JOE

23:06 It doesn't mean that, yeah, if this is something that could be utilized... then we definitely want to, you know, let them know that. So I don't want that door just yet, so.

MEDA

23:21 Absolutely. No. I get that. And I should have prefaced this with we're not gonna do like two year, one year long projects. I'm talking mostly like six month projects where you need like budget whip, change orders. If we're if you're getting into Construction zone, you need a lot more than service strait. Can...

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

JOE

23:39 That's right?

MEDA

23:41 So, we would just do like light weight projects and things like that. And then what about yal's, inventory? Do you usually orders, you go warehouse, mix it? Both? What's the situation?

JOE

23:54 You know, that's I'm gonna write that down because that never occurred to me because that is actually a good point. You know, right now, we're doing it again on an excel sheet, handing it over to the owner... and... that actually is pretty good. So go ahead and talk about that.

MEDA

24:18 Yeah. I would say most folks of your size do order as they go just because you have a lot of inventory on hand.

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

MEDA

24:25 You're burning a hole in your pocket typically, but we're gonna be able to track from POS to warehouses to trucks, to job sites. So our whole goal is making sure that you're using the right part on the right job with the right markup because those parts change all the time.

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

MEDA

24:43 The pricing changes really way too often. So we wanna make sure that you guys are one charging the right amount, but two using the right part on the right job. So we'll kind of track those parts. You can track your ordering received partially received like whatever it is.

*--- Quote templates ---*

MEDA

25:01 It also helps, you know, if we pre bake in some of our parts that are needed for these, you know, like PM jobs or things that are pretty typical that, you know, the parts ahead of time. It makes it really easy for your texts or you guys in the office to prep those texts with everything that they need for the week, you know, all the widgets or all the filters that they would possibly need.

*--- Access to information ---*

MEDA

25:23 So it just kind of gives you a good snapshot. And then of course, check inventory levels, make sure we have what's on hand. Make sure we're ordering what we need to order things like that. So we'll talk about that and how we track that and use that. And then of course, we're going to track technician time and things like that. Cool. So for your text your folks on iphones, androids, tablets?

JOE

25:47 Yeah, no tablets. You know, I've had, I've used those in the past at my prior companies and the tablets. A, it's always been a hit mess. I've had some success. I've had some just, you know, it just doesn't work very well. It's not, you know, they don't actually use it or utilize it to its need. Yeah. So I've when I came here, there was one one technician using a tablet and everybody else wasn't and I said, you know, what? Let's just do away with them for right now. It's more money than it's...

MEDA

26:25 Yeah.

JOE

26:26 Yeah. It's costing us more than saving us. Yeah, but everybody else has a mixture of iphones, and androids and whatnot?

MEDA

26:36 Okay, cool. As long as they're not on a flip phone. We're we're good to go. You, you laugh, there's some folks out there, man. I'll tell you what?

JOE

26:45 They are, they are out there. Sometimes I'll see them. And what about the flip I'm like back in?

MEDA

26:52 I know I was thinking about the blackberry the other day and...

JOE

26:56 That...

MEDA

26:57 That was a solid one, the little track ball and everything. But yeah, as long as we've got an app store, we're good to go. We are on an app for your technician side of things. And they actually don't need internet as well in the field, we find that a lot of our customers are on oil rigs, are underground or, you know, wherever they're at, they might not have internet.

--- Assets ---

MEDA

27:17 So you guys can do everything that you need to do with no self service. They can record parts labor other cost information. They'll have task lists, location contacts, complete equipment and location history at their fingertips. They can take pictures videos. If you guys do have any custom forms, we can digitalize those, put them in the software.

--- Forms ---

MEDA

27:41 So for the custom forms, there's a couple of different options for those. We can hold those on the customer level. So if a certain customer has a specific type of form regardless of the job that you're out there, they want this form filled out. We can do that as well as we can tie forms to types of jobs.

--- Forms ends ---

MEDA

27:58 So every time you go out and do an H vac, PM, this is the checklist that's going to follow for the paperwork. So we could do that. And then everyone in our system is set up with their own set of preferences. So if you want them to get customers to sign off on work in the field, if you want them to invoice in the field or create field quotes, that's totally fine.

--- Customer engagement ---

MEDA

28:23 If you want two out of the three of those to be through, you know, through the office and you have some manager oversight that's totally fine as well. We can get very granular with what people can and can't do within the software and then customer communication. So you'll be able to share Rich realtime updates from the start to finish of each job notifications, when your texts are on route, appointment, reminders, those after job reports with the pictures, videos, forms, any detailed summary, and then of course, paying invoices and approving quotes online. And then a big hitter for you. Is that management visibility because your data is all going to be centralized into one place, we have an integration with Quickbooks. You're always going to know what's going on. You have one place to look now. So if you guys do have any like customer issues there's, a detailed work history and log in there that you guys can solve that.

--- Quoting ---

MEDA

29:18 I mean, it gets so granular that you can see when your customer clicked on your quote, right? And where they were when they clicked it. What's really cool is if you have some people who maybe opened your quote and didn't approve it, you can just mass, send those all back to them and say, hey here, hey, KAL, same thing with your invoices. They're not paying mass, send all those back out to them and send them a little reminder.

--- Quoting ends ---

JOE

29:39 Like that. That's good. Yeah.

MEDA

29:41 Yeah, same thing. If you guys have any internal process issues, you're hiring there's, probably gonna be a problem child in there somewhere if there's not, you probably already have one. So, we will have a audit log as well in there. So you guys will be able to tell on the daily who's messing up, who's bringing in what revenue, who's not showing up to work. You know, all those things. You're gonna have insights. And then of course, we kinda talked about it, the financial piece of margin performance, technician, productivity, all of that, where are we kinda at with this job? Cool. So that is a little bit of a powerpoint. We, that by powerpoint, you will get right into the software.

--- Dispatch ---

MEDA

30:25 So I'll show you three different views today. The office view the technician view and the way your customers will see as well. So let's start off in the office view. This is our homepage. We've got our daily schedule here of when and where our texts are gonna be. Click into here. You'll see the work order. We scroll down. We see over overdue jobs without appointments and jobs without appointments, do in the next two weeks. So this gives you a snapshot of what's upcoming. So if you guys are too busy, you can't go out and do the work that week. Go ahead and create the work order. It's gonna sit in these buckets until you are ready. Same thing with preventative maintenance, set it and forget it. It's going to populate here right in front of your face two weeks in advance to give you guys a heads up. So we don't miss those jobs. Of course, we have a scheduling and dispatch board and of course, those jobs are going to show up on there as well. But we want to put this on your home page, and then we have jobs to be marked complete. And then jobs that need to be invoiced. So essentially just different stages of your workflow. We've got our technicians clocking in and out here with pins on their locations. So you guys do get an emergency call, go check on this board, see where your tech is and see if you could dispatch them out.

JOE

31:42 Fair.

MEDA

31:42 For scheduling and dispatching, we have a couple of different boards for that. So our scheduling board is based off geographical location. Different colors mean different things. We'll kind of train you on that and we can customize that. But essentially, this is really good at planning out routes and you can tailor down the list that you're seeing by a certain date range type of job, you know, whatever you want to filter the list by. So this is really good. Cutting down on one shield time, planning out routes, things like that. And then we also have a dispatch board. So we've got a day weekly and a monthly view here that's really cool as eventually these boards are gonna combine and be all on the same page. But we've got a day weekly and a monthly view here. We've got our technicians and their swim lanes. So you can also put in your search for your texts, things that they're really good at, you know, different things like that. You can put color coat them whatnot, so technicians swim lanes, let me scroll and see if I can get some actual jobs on here just to visualize it. Okay, there we go. So you click on here, you'll see the work order, see the details. Your queue is there to use as you wish. So I would say most folks mass schedule their preventative maintenance all at one time, which is a recommended workflow of us. And then maybe their emergency visits or any other type of jobs, they fill in the gaps with their queue. So let's say I want to put this on ozella's calendar. Right after there. It's just a drag and drop. And once I drop it, it's scheduled on her calendar. You have an unassigned button if you're not ready to, you know, schedule it yet. And then we have our available jobs over here. And again, you can filter down this list and it's just a drag and drop over.

--- Access to information ---

JOE

33:48 Okay. This is.

MEDA

33:49 For scheduling and dispatching?

JOE

33:53 Yeah. It does, you know, I was looking at... you know, the queue because obviously, my... many hats that I wear dispatching is one of them. Yeah, yeah.

MEDA

34:11 And you can do this on the fly too if we want to give you access to the well, we can give you access to the technician side of things. So if you're in the field and you need to do this on the fly, you can do that as well. You don't have to be logged into the office side or you can do that. That could be a permission that maybe we just give, you know...

JOE

34:28 That's good. Cool. I'm just writing notes as we go. So.

*--- Recurring maintenance ---*

MEDA

34:35 No, you're all good. Let's touch on how we're going to set up your companies and then jump into a work order. So we will have parent and child associations. Yours will be a lot more built out than mine but you've got your headquarters up here and then each individual location.

*--- Assets ---*

MEDA

34:57 So each location will have its own service history, asset history, et cetera. You can put a preferred technician on here. You can put comments on here. And then you can put attachments as well. So any kind of files, documentation on the headquarters level. But you also.

JOE

35:14 It can all, this can be imported from Quickbooks.

*--- Assets ends ---*

MEDA

35:17 Yeah, yeah. Yeah. We're gonna take all your data, anything that we really can to put in here to help you guys and make it easier. We're gonna do and remind me with your SmartService. Do you know when your contracts up? Because we could pull things from there as well?

JOE

35:35 Good question. I'm not sure but I'm an, make a note of that to find out and I...

MEDA

35:40 And I...

MEDA

35:45 I believe SmartService is month to month.

JOE

35:50 Could, could you hold on for one second there? No. You're all good. Yeah, sorry. No.

MEDA

35:56 No, no, please. You're running the business?

JOE

38:20 Okay. I apologize for that. We are good.

MEDA

38:22 Yeah, no worries. I did just google. I mean, depending on your plan, I'm not sure what you'll ended up going with, but SmartService should be month to month. I do like to say, I would recommend a one month if you guys, if you guys can do that, that's totally cool. If you can, you know, whatever.

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

JOE

38:40 Is saying to kind of keep them online to be able to import all the information?

MEDA

38:46 Correct, I would keep your SmartService for a month while you're onboarding ServiceTrade or whoever you're doing just to ensure that we can get that data out because you guys are gonna want that data.

*--- Recurring maintenance ---*

JOE

39:00 No, it's that's, good thinking there. Yeah.

MEDA

39:03 Absolutely. So cool. Now that we're back into this location. So this is our individual college road location still tied to my headquarters. I can have certain types of tags on here. Like I have some silly ones like block customer didn't pay don't service. You know, hopefully you're not hopefully that's not have any of you guys, but

you guys can create custom tags in here. But if we scroll down, on my location page, I have my two active services that are going on. I've got any previous jobs down here only on this one location.

--- Assets ---

MEDA

39:45 And if I click in here, I'll see the work order, and I also see the invoice right there. This is searchable. And then I have my full list of assets, don't make fun of my silly ones in here. But... but we're so we're going to categorize all of your assets. If you don't have them categorized already, that's totally fine. Your techs in the field can do that. As they go. We have an OCR scanner built into the app. So.

JOE

40:13 So...

MEDA

40:13 Essentially, they'll hit add asset. They'll take their phone, take a photo of the sticker on the asset. It'll pull in all those details, you know, the filter belt, you know, whatnot... and we'll start making an asset history from there.

JOE

40:29 So...

MEDA

40:30 There's a lot of details that we can grab off this. And again, don't make fun of my silly things in here because I made this up. You clearly don't want me servicing your unit.

JOE

40:41 But...

MEDA

40:43 Manufacturing warranty date, and warranty dates will absolutely be on there updated with your last inspections and all of that stuff. So you can absolutely pull reports on warranty dates and things like that.

JOE

40:56 So, is the asset table customizable?

MEDA

41:05 Yeah, yeah, yeah. Absolutely. So some things, you know, like location on site might not be on the asset sticker. It might be something that they have to add in unless it is on the sticker, which is great. So you'll have your assets categorized. And



then it's just kind of the same thing as the location page. We have our active service on this one asset. We have any previous jobs on this individual asset.

*--- Access to information ---*

MEDA

41:32 So your tech is gonna get this in the field. The biggest difference with your text is they're not seeing these invoice details. They are strictly seeing the work that's been performed, the forms that have been filled out, the deficiencies that were logged, the pool through work, things like that. They're strictly seeing the work side of things, not the admin invoice side.

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

JOE

41:52 Okay. Does it show financials of the ticket?

MEDA

41:57 Yeah, yeah. Absolutely. If we click into the ticket, we're gonna see that margin and all of that activity in there. Okay. And we'll get to that when we invoice, and then we break up deficiencies as well. So pull through revenue.

*--- Deficiencies ---*

MEDA

42:10 We were talking about it earlier. This is how we do that is through deficiencies, just they're just repairs. So this is really good because I can search in here and be like that Dang compressor, make that repair and replace conversation a lot easier. So your tech houses in the field will have all history filled out for the jobs and then on the deficiencies as well to easily pull up those past repairs.

*--- Assets ---*

MEDA

42:40 We'll also put it in front of you and you guys quote this out just to give you the past history as well... any previous quotes, any sub assets, any at, for this unit, and any kind of comments for this unit as well... before we jump into the work order.

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

MEDA

43:03 I want to show you how we hold contracts because that's gonna come into play a little bit later on. So service contracts, you can have one standard one for all of your customers or you can have each individual one for each individual customer or, you know, a mix of both. So with these contracts, we have, you know, our validate expected revenue invoice to date margin, actual margin. This gives you a snapshot of

your contract. Now your contract could be just used as a framework because you can still adjust things on the back end when you go in quote and invoice.

*--- Quote templates ---*

MEDA

43:40 However this is gonna be your framework for building that out. So every time I use this contract, it's going to have these line items with these prices.

JOE

43:52 Okay. Every.

MEDA

43:53 Time I use this contract, it's going to have these kind of payment terms, these charges, these trip charges, admin charges, these kind of markups.

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

MEDA

44:03 So we kinda talked about how parts are changing all the time and it's really important that we're you know, netting from those. So instead of banging your head against the wall daily, making sure we're charging the right amount for parts, bang your head against the wall, maybe monthly and just have cost markups cover. So anything that costs up to X amount, we're going to mark it up, Y amount and that can be different for different customers too. I like that. And then, we can drill down even further to level of detail, certain kinds of terms and conditions if you have.

JOE

44:42 Does this actually pump out a service agreement quote? It does.

MEDA

44:49 You can, yeah, yeah, absolutely. Then you can take that quote, turn it into your jobs. So if each location has a different contracts involved, we can do that. Any invoices where you've used this contract is gonna show up and any kind of comments and any kind of attachment.

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

MEDA

45:09 So that's building plans that's you know, whatever you would need a map, you know, whatever it is, a full attachment list there as well. Cool. Any questions on contracts? This is kind of what I was asking you. How would you compare the way that we hold preventative maintenance contracts to what you've seen?

JOE

45:33 Yeah. I can see where a lot of the effort and thought has gone into, the contract portion of it because it's obvious you really kind of... put some thought into it... that's what we're trying to. I've been tasked to try to push a lot of contracts. The past year didn't go so well. I only got, you know, a very short amount done or, and actually booked. But, you know, that's a big focus of mine, and maybe it's not so much my approach. It's it's how it's delivered or what we, our deliveries are. But, you know, some of that too, is, you know, tracking it, make sure we're doing what we say we were gonna do. And again, it's done through an archaic way of manner of doing it. So, yeah, I like what I'm seeing in that for sure.

MEDA

46:34 Awesome. And I am totally not trying to upsell you. I think we should do this down the line if we do it, but that sales tool that I was talking about might be a huge hitter for you guys down the line. I mean, I'm welcome to talk about it now, but I don't want to throw too much at you.

JOE

46:51 The, the sales piece again, many hats, right? So yeah, we do have dedicated sales team but I am my own estimator, and so, I pump out tons of quotes in proposal. Yeah. And, you know, so it's probably gonna be something that I will want to look at... to help out now, they typically use if you ever heard of bit tracer. I'm sure you have. Yeah, but yeah, they use bit tracer as their sales tool. Okay?

MEDA

47:30 Why don't I do this after this meeting? I'll send you a quick video on our sales tool just for you to have on hand. If we want to dive in, we can dive in if we wanna, you know, you just have that for the future that's totally fine as well.

JOE

47:45 Yeah. Send it to me. And if I feel like we need to have another Powell session, I definitely will. Yeah.

MEDA

47:52 Cool. Perfect. All right. So let's get into our work order. So... scroll down a little bit here is, you know, my appointment. So a lot of spots where you can use templates.

--- *Type of work* ---

MEDA

48:09 One that I definitely recommend is on that pull-through revenue on the repairs. And right here when you're scheduling especially if a lot of what you're scheduling is preventative maintenance. It's something that we're doing pretty routinely let's make it easy on you guys to schedule those out. So what I'm talking about is I can have templates in here for certain types of jobs.

--- *Quote templates* ---

MEDA

48:31 So every time I go out and do a quarterly PM on an H vac unit, this is my description and these are my parts and labour items. So you can have that pre base that's what I was kind of talking about. There's things that you guys can do to make your text lives easier and get them out the door faster. And this is one of those ways of having the parts and stuff already set up in here. So we know what we're going to need to use now.

JOE

48:58 Yeah, it's really nice.

MEDA

49:01 If we're gonna add a part, we will take a list of inventory. If you guys do have it and put it in here with the pricings and whatnot, something like a widget you probably got on hand.

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

MEDA

49:13 So we can just mark that and that's coming in from my inventory. If we're ordering a part, it's something that you guys don't have on hand. I a, I'll just notate it the same way. I don't have this certain filter. So, I'm just going to manually add it. And your tech could do this in the field as well or notify the office, to order this part. I'm just gonna pick a random service line and then put it in a part cost. So let's say that's 25 dollars. We're gonna select a source. So at the start, we might not the nitty gritty of, you know, what's on the text truck, what's in the warehouse, all of that stuff, but we could eventually drill down to that.

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

MEDA

49:53 But what's gonna be really important is just tracking your parts and ordering those. So we're gonna put in all of your parts, vendor information. So say we order this from acme here's. My po number... and here's my status. So let's say I've ordered this, it's gonna be in on Monday. So when that part does come in, I'm coming up to my handy dandy search bar, typing in that po number and this work order is showing up. So I know that part gets used on this job when it comes in.

JOE

50:28 That...

MEDA

50:30 I thought you would yeah perfect. And then... attachments. Okay. Let's say that, thank you attachments. So if you had any kind of blank paperwork in here, any need for documentation, it would all show up in here and attachments, any kind of vendor bills. If you want to add those in here. If your technician went to home depot and took a picture of a receipt, it would kick back into here.

JOE

51:00 Nice.

MEDA

51:02 Yeah.

JOE

51:02 We get deemed on by our admin all the time on where's the receipt? She's doing her job, she's doing her job.

MEDA

51:10 Yeah.

JOE

51:12 But it's on us to provide them. That would make it really nice just to a picture of it.

MEDA

51:18 And it's all linked together. Cool.

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

MEDA

51:21 So we've talked about the asset history. We'll kind of touch on the rest of these when we come back because you're immediately getting visibility azure tech goes and does things, in the field. The office is immediately getting updated. So we'll kind of touch on those pieces at the bottom when we come back. Any questions on this side before we do the technician. And then we quote an invoice.

JOE

51:45 Now, I like what I'm seeing so far, cool.

MEDA

51:49 Cool. I thought you would, so let's switch gears. Now. Have you ever seen a demonstration of service trade before?

JOE

51:59 No, it's my first time.

MEDA

52:01 Okay. I thought, so, I didn't see any record of it but, you know, records are only as good as they're the person who's in putting the data.

--- Access to information ---

JOE

52:08 Yeah, no, it's...

MEDA

52:11 Cool. So I am on my iPhone today, so you'll get a look and see what that looks like. It works the same with iPhone, androids, or tablets. It's just, do you want a bigger screen, but I'll show you we make it really easy for texts.

--- Access to information ends ---

MEDA

52:28 I don't know if they gave you a background about us, but we're actually a tech founded company. Our CEO and our coo were texts in the back industry. I won't age them but a certain amount of years ago and notice that all the technology they were using was actively working on against them and making their life just harder and didn't focus on the right things like asset management, PM contracts, you know, that recurring work that's really going to move the needle and, you know, all of that kind of stuff. They were like the software suck. So... there was born service strait so really easy for the technicians. And again, we can drill down things that they can and can't do within here. But let's click into our work order. Excuse me?

MEDA

53:20 Okay. Sorry, I don't know if I muted in time anyways.

--- Tech On-site ---

MEDA

53:25 They'll clock in on site. If you guys want to track drive time, we can track drive time and then notify the customer of the eta fast track and drive time. All I do is clock in on en route. And then I clock in again on site and it switch those times to stop the en route and start the on site.

--- Tech time tracking ---

MEDA

53:43 We also have a job prep function. It's kind of a miscellaneous. I will say not a lot of people use it but some folks use it for like warehouse time and getting those parts out and just kind of documenting and paying for that time. Okay, cool. Clock in.

--- Assets ---

MEDA

54:00 And then as a tech, it's super simple from here. We make really easy blocks. So they've got directions right up here. Anything that they would need. They can, it pulls

up their maps from there too. And then all they got to do is go into their services and see what needs to be performed.

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

MEDA

54:19 So we can hide the estimated price if you want this to be a general list. If you want this to be a check off list in terms of like a tasking list, we could do that as well. And then if there's any kind of job paperwork that would be here.

*--- Forms ---*

MEDA

54:34 So any kind of check off list, anything that they need to fill out will be in there and they'll just fill it out through the software. So as soon as they fill it out, there will be an attached filled form in your attachments. So it's all linked to the work order and everything like that.

*--- Assets ---*

MEDA

54:50 And we'll stay in there. We've got our comments. Most folks use this as like a gate code building map. You could also add a comment down here or put a comment for your tech. We've got any kind of on site contacts if needed. And then we've got our job items down here at the bottom.

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

MEDA

55:10 So we can see that filter was added in the office. It's in gray to notate. Yeah, it's in gray to notate that. Hey, you can't use this part. It's on order. You can't click it off that you used it, but it gives them visibility of, yeah, my office already ordered that.

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

MEDA

55:31 And then if they needed to add another partner item, they'd come down here to add partner item. And that's the list of inventory that we're gonna grab from you guys with pricing rules and everything pre baked in has a search bar up there too if needed. And then if they're going to home depot or what not picking up a. Part, we can go to other. And that way they can take a photo of the receipt, put in the part, just kind of manually add those details.

JOE

56:00 So if you go back to the inventory piece of it, how do O, how can, does it have to be like, how do you import a vast amount of inventory into the software? How do you do that?

--- Accounting ---

MEDA

56:13 A CSV file? So we'll take your excel spreadsheet and just put it in there. And then as those parts... as those prices change, and whatnot, how we recommend you guys doing it is just take another mass upload of a CSV file. And that way you're not having to go into every single part and updating the price.

--- Quote templates ---

MEDA

56:36 You could just do it all at one time and ServiceTrade will just correct the new price. Instead of adding multiple parts and things with different prices and stuff like that. It's just going to update and add the new parts.

JOE

56:48 Okay. Yeah.

MEDA

56:52 We've got those job items and then we've got our asset history as well.

--- Assets ---

MEDA

56:58 So I could click into this H vac unit, see the service history, see the deficiencies, see any kind of attachments, comments, tags. And then here's all my categorization of this unit... and all that stuff. I got.

JOE

57:15 Inventory of.

MEDA

57:19 Yeah. And you also a, I could click over here to all and see all of my units on site. So if I am going out there and try to look for some pool through revenue, it's not always gonna be the unit that I'm looking at today. You know, I might get tasks to, you know, when I walk in the door, owner taps me and says, hey, this unit is funky too.

--- Deficiencies ---

MEDA

57:41 I didn't tell you all about it. Yeah. So they're going to have access of the other units on site and can log, a potential repair off that or the unit that they're working on. So we were able to do that repair right then and there or we need to go back out because we've got a part on order. We've got a quote it, whatever that resolution is.



We're gonna do it all the same way through deficiencies. So I'll click into here. It's pulling up any previous repairs as well. I could look at open tickets and I can look at fixed as well. So I'll come down here to add a new repair. And now I don't have to have a ton of description... and by the way, there is spell check in here.

JOE

58:35 Nice.

MEDA

58:35 Also use a voice memo. I don't know if you want them to tell them that they could use their talk to text, but they could. So that's up to you if you want to tell your text, if that's available.

--- *Deficiencies ends* ---

JOE

58:45 I would figure it out. They'll probably choose, I choose not to.

MEDA

58:50 So I can be like, hey, this thing sex... like maybe we don't talk about that. Okay? We, we don't need to continue dictating that. That's lovely. Okay. Thank you so much. Let me delete this. So future me isn't like what the heck?

--- *Deficiencies* ---

JOE

59:12 That's good.

MEDA

59:15 We'll keep, hey in there though. That's fine. Cool. So I don't have to have a ton of description because I'm adding attachments. So I'm gonna let my work show for itself. So attachments, photos, videos, voice memos, maybe we don't have the voice memos there... and they're not limited to any, you know, kind. So they can add as many photos as they want as many videos that's definitely, you know, a broken compressor. I can add a description on there as well. So if I want this to be a before photo and I do another one, I can, you know, categorize that as after whatnot?

--- *Deficiencies ends* ---

JOE

59:55 I like that a lot.

MEDA

59:57 Yeah.

JOE

59:59 Because, you know, there's a lot of time like last year for the whole year, they were running a... the vendor that, you know, we get all we get our parts from. They're running a promotion. And if you saw an andequated unsupported device out there, the customer would get an incentive and whatnot. Well.

--- Deficiencies ---

MEDA

1:00:23 Cool.

JOE

1:00:24 This is a way to capture and bring in additional revenue, right? And a lot of times the guys would be like, hey, Joe, I got a it's really one and I'll be like, okay, what we need to take is the picture of the serial number and host ID of that device, send it to me, you know, obviously either through text or via e-mail this would be ideal situation of, hey, this is what it is. Now, I could easily go back to it, pull it up and it's again looking for centralized locations, right? So.

MEDA

1:00:57 Easy, easy to use centralized data. All that absolutely we're gonna mark the severity. We were kinda talking about this earlier. Is this a suggested repair? Is it deficient? Isn't inoperable? They might be notating a bunch of pool through revenue through this so they can notate what we would suggest or if it's inoperable?

--- Assets ---

MEDA

1:01:16 Whatnot I'm gonna say it's inoperable for today. And then again, they might not be working on that same asset that we came out to work on. So we want to make sure we tie it back to that asset. All that's showing up is the assets for my location... and I know that isn't a split system.

--- Deficiencies ---

MEDA

1:01:35 And then we'll mark our status. So if we were able to fix it right then and there, we'd say fixed in our office would be prompted to invoice. If it's a new repair. We've got to quote it out. We've got a part on order. Whatever the reasoning is. We cannot complete this repair today. We'll say new, and then our office would get our proposed solution of, you know, order part XYZ, quote whatever it is. Hopefully they give you a better description than me. So as soon as I hit saved, the office already got this detail.

--- Access to information ---

JOE

1:02:06 Nice.

MEDA

1:02:09 Sorry, they're the caveat unless they're not on internet, which they could do everything that we've done so far. They could do everything that they need to do. The only caveat is it will take a second to lag to the office. So once they drive away, they get back picked up on internet. It'll automatically send for them. It's not something that they have to trigger out. It just might have a pause on the send before it gets to the office. And the...

JOE

1:02:34 Everything they're doing is if there was no internet, be an offline status situation until internet's connected again. And then, okay.

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

MEDA

1:02:45 Yeah. So there's gonna be where when I hit save, I want you to look for it. There's deficiencies in this corner right here. It's going to have a little circle loading button... right there. You see that circle loading. I know that looks really small and it just disappeared. So that was telling me that sent to the office, right?

*--- Access to information ---*

JOE

1:03:06 Got you. Okay.

MEDA

1:03:07 So, office already got it. And again, I don't have to trigger it out or anything. It's just gonna go now. I'm assuming you want your quotes and invoices to go through the office. Okay. We'll take off that functionality unless, you know, you're in the field, we want to give you that, that's fine. Do you want sign offs in the field? May we've done this work?

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

JOE

1:03:30 Yeah.

MEDA

1:03:31 Cool. We can do that before the work's gone off as a hey, heads up. This is what we're doing. Sign off on that. I know some schools require that, not sure if your district does, and then we can also do a post work acknowledgement, but again, we do not want our techs to do is, an admin work because that leads to a lot of problems. We'll leave it there. So create work acknowledgment. I don't have to do anything. The software is doing it for me. You can go ahead and select a contact to automatically apply. It's really easy just to pick your contact too. And I will say you're not going to

have a 1,000,000 of me in here, but what you can have is titles on there. So the accounts receivable, the onsite contact the owner, like whatever. We can have titles on there and we can automatically get those added. So, you know, we can cut that step out for the tech as well.

JOE

1:04:26 Is that all through Quickbooks as well? Is that how the context were populated?

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

MEDA

1:04:31 Yeah, yeah, absolutely. So, yeah. So I have my services in here, my job items, my files, and photos, my deficiencies and comments are already baked into here of what my tech has done so far. So again generate invoice would be taken out for you guys. All I would say is continue. So at this point, your technician would hand their phone to the customer and say, hey, review these details. Your customer is gonna scroll down, review the services, the parts and labors, and the deficiencies. And then they could go ahead and sign off.

JOE

1:05:08 So where was, where did they put their rid up their submarine?

*--- Quote templates ---*

MEDA

1:05:13 They didn't the software did it for them. Yeah. So it pulled in their service, it pulled in the deficiency. It pulled in the labor items. And what this is gonna do is it's gonna create a doc that's going to be sent to the customer as well as attached to the work order.

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

MEDA

1:05:38 So mark that off. I'm the customer. I'm gonna confirm and sign hit next hit that signature complete. So it's already attached to my work order and the customer already got a copy. Cool. You're ready to clock out.

JOE

1:06:00 Park it out. All right?

MEDA

1:06:03 There are more functionalities on here, but I know we're kind of limited in time.

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

MEDA

1:06:06 So if we want to dive into some things that you could be able to do and maybe not the rest of the texts, we can do that as well. But I just wanted to give you a general synopsis of kind of what the typical workflow would be... cool.

--- *Paper process* ---

MEDA

1:06:19 So our customers are our best engineers. So they have been banging down our doors telling us that while you made the software is super easy for our texts to do, sometimes they still just don't do it. So we can have digital hand cuffs on them, whatever you guys want those hand cuffs to be.

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

MEDA

1:06:39 I cannot clock out until I've done that. So my office required me to attach a photo to find and record a deficiency as well as leave a comment. Again, this could be whatever you wanted it to be. So I physically cannot clock out until I've left my comment.

JOE

1:06:55 Nice.

MEDA

1:06:56 Yeah. Cool. That way you're ensuring the office has everything that they need to go and quote this out or to do the next step and you don't have to waste time sending a tech back out and waste money and you know whatnot? Cool. Yeah.

JOE

1:07:10 Now you can clock out.

MEDA

1:07:12 Absolutely. So, I've clocked out the office immediately got visibility, maybe cool. I'll touch on this work acknowledgment, and what that looks like when we go back to the of, or to the customer side of things. But you're gonna get an e-mail and you can have salesperson assignments too.

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

MEDA

1:07:33 So if you want these to go to specific people in terms of this customer. So everyone from trader joe's is going to Tim, and everyone from golden coral is going to Joe, things like that or you can just have these blankets send to whoever is gonna do your quoting. So.

--- Deficiencies ---

JOE

1:07:57 It's long.

MEDA

1:07:58 Meat and potatoes is this link right here? This just gives you a snapshot, but this is what's gonna bring you back into the office side of things for you ready for you to quote. So this is a deficiency record. It is literally just tied to our original work order. Just think of it as a record within a record. So before I go add it to a job, if I don't need a quote, or before I go quote, we're gonna give you any related deficiencies... any comments and any attachments as well. So photos, things like that. Cool.

--- Quote templates ---

JOE

1:08:38 Yeah, I like that.

MEDA

1:08:40 Awesome. Let's build out our quote, see, I'm applying. I, you can a, well, let me pull back. You can have contacts contracts. I cannot speak contracts automatically applying to locations. So that's that framework that we were talking about earlier for our contracts. And I'm about to show you how that's gonna come into play. But before that, does I need to build out my quote? So you don't have to do this, but there is absolutely a recommended workflow is to use templates. Do you guys use anything similar?

JOE

1:09:14 You know, we have our own internal templates word documents that we use... bit a bit tracer. Yes, they use the heck out of that and I do everything for them. So, yeah.

MEDA

1:09:29 Yeah, yeah. Cool. So on these repairs that you're doing pretty routinely, it's the same thing like setting up those jobs. We recommend using templates. It applies a quote description, your warranty and any parts and labour items. Now, my quotes spilled out. So I just have to come in here and adjust any kind of details.

--- ST app contracts and pricing ---

MEDA

1:09:52 So if I wanted to take out that sentence, hopefully not write that, right? Adjust any pricing down here. So let's say I wanted to charge 100 bucks for that and 100 bucks for this. Now where my contract is coming into play is a lot of spaces, but specifically these markup rules right here, they marked that price up automatically for me based off my contract rules.

--- Accounting ---

JOE

1:10:20 And...

MEDA

1:10:22 My tax is automatically pulling in a.

JOE

1:10:25 No tax. Yeah. So.

MEDA

1:10:28 Yeah. So when you set up your customers, you can make a certain customer tax exempt or a certain customer have tax or maybe a certain maybe you guys don't do tax on labor, you know, whatever that is.

--- Quote templates ---

MEDA

1:10:41 We can get pretty granular with that, but it's going to automatically pull in. And then if I needed to choose another rate or make this not taxable, I could just do that. Cool and then adjust the level of detail for your customers. So some folks like grand total, only some want it fully lined out kind of however you all prefer this to look and it might change per customer.

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

MEDA

1:11:05 Any kind of comments and attachments are gonna be there at the bottom. Now, we'll go ahead and shoot this over to my customer... toggle off. And this is where the managerial oversight comes in as well. Toggle off any kind of comments, voice memos that we that shouldn't be customer facing, you know, make sure we include our photos, things like that and then pick who we want to send this to. I'll send it to myself... and show you what that looks like. All right. So I, as a customer will get an e-mail for a quote. Hopefully it won't say some junk like that, but this is essentially what it'll look like and then they'll open it up. And this is where we were talking about making recommendations.

--- Quote templates ---

MEDA

1:11:57 I could come in here and request changes and be like only do compressor replacement or whatever. If I, you know, didn't want to approve this whole work or what? I know this is all a compressor replacement, but you understand if you were documenting multiple repairs, they could just request one being done.

MEDA

1:12:18 But your logo would be up here. Anything from description of work down is fully customizable. So what you sent here, how you line up your parts, labor and items, the terms and conditions and the files and photos and comments that you attach to this.

JOE

1:12:34 And I like that. That makes it easy.

--- Quoting ---

MEDA

1:12:37 I'll approve that... check of approved quote. So this is, I, this is time date and stamps on my end as well as the office side. So that quote status was at submitted. Now, it's at approved. And I also get a history here. This is TAM, it's a little creepy but it's enjoyable. You get to see when they viewed your quote and when they approved your quote.

--- Quoting ends ---

JOE

1:13:06 That's too cool.

MEDA

1:13:08 Yeah. It's a little bit tracking. So now, from here, and are you okay on time? We're almost done. Do you, can you give me like 10?

JOE

1:13:16 Yeah, because the, these guys are.

MEDA

1:13:20 No, I'm sorry, I'll be so quick. We'll just invoice and then we're good to go.

--- Quoting ---

MEDA

1:13:26 So you could do one or two things for this quote and it might change depending on your workflow or your customer. We could either create a whole new job from this quote. So essentially invoicing after every visit, keeping them separate or we could add this to our existing job because we've got to go back out and do our repair anyways.



MEDA

1:13:45 We might as well invoice all at one time, but you have both options there to do as you wish. I'm gonna add this to the existing job to show you what that would look like.

MEDA

1:14:03 Cool. So now we're gonna be back on our original work order. And what I did was just add this appointment to my original work order so you can have five, 10 20 30 appointments under here and pick and choose when you want to invoice these.

--- Dispatch ---

MEDA

1:14:19 So you can just keep it open for a while. Go after every visit. This is going to show up on my scheduling and dispatch board to go do that. I could also come in here, pick a date and time and schedule it. It shoots back down there. Put my tech.

--- Tech On-site ---

MEDA

1:14:36 All right. Cool. That's all my text calendar. It's gonna be on the scheduling and dispatch board too. But at this point, everything on the work order has been updated. So part items from both visits, my clock events down here. So if you had another tech on the job, there'd be another bucket with another clock event.

--- Tech On-site ends ---

MEDA

1:14:54 Same thing as if we went out to do that repair there'd be a second clock event down here with those times and you'll see this as a whole too throughout the week, per tech, the ROI that they brought in the days that they relate, things like that. Cool.

--- Tech On-site ---

MEDA

1:15:10 You've got your asset record, your deficiency, record your comments and attachments, so that's the work acknowledgment that we got signed. If we had any paperwork that would be filled out, it would be in here, any kind of vendor bills, anything like that.

JOE

1:15:28 At that encompasses quite a bit... of centralized involvement for the customer. And what we would need to do.

--- Invoicing ---

MEDA

1:15:41 Yeah. I thought you were gonna like this. So let's complete the job and go create that invoice. Cool. Create this invoice. And I'm really almost done. All we've got to do is shoot this out. But here's your invoice, you've got your gross margin on this job, you could come in here and adjust any kind of level of detail, put payment terms on there, anybody paying with check or cash for you guys?

JOE

1:16:13 You know, a lot of its checks, we do some credit cards found a time. So.

MEDA

1:16:19 So you're gonna start all of your jobs in service trade and you're also going to end all of your jobs in service trade. So if you guys do get a check, you're gonna notate it in here now with that reference number because we're gonna be talking to Quickbooks. So your Quickbooks will be updated. So if you have a check or cash, you'll manually notate that here. And then we will push that information to your Quickbooks to let them know it's fully paid, partially paid or what the resolution is. Now, if we were just sending a real invoice, they could pay with credit card or ach, not that the other one wasn't a real invoice, but I, they could go ahead and pay now and again, we don't hold anything.

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

MEDA

1:17:06 It goes directly to you guys, all that stuff and it's kind of the same thing as the quote. I had these services split up into, you can really customize how this looks, your terms and conditions, all of that. And then last thing I'm gonna show you is service details.

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

MEDA

1:17:24 This is that customer centric piece. You could send this before the job has gone off as a hey, heads up during the job, as a Progress check or after on the invoice or as a standalone and you can tailor down this data too. So we have our appointments, our services... parts and items used.

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

MEDA

1:17:44 And again, you don't have to include that. If you don't want to any kind of comments, any kind of attachment. So that's our work acknowledgment. It would also be like your checkoff list, paperwork, things like that. And then your deficiency that was fixed with the photos and they could pull that up. Big. Last thing here's. Our work acknowledgment. Remember our tech in build this out. The software, did it for them?

*--- Purchase decision ---*

JOE

1:18:11 Yeah, that's the crazy part.

MEDA

1:18:16 Yeah. Cool. That's it. I...

JOE

1:18:20 Well, I do appreciate everything that you've shown me so far. I know there's probably a lot more that we can touch on if you wouldn't mind sending me that video, yeah, the sales portion of it, and I'd like to take a look at that as well as.

MEDA

1:18:36 Bland...

JOE

1:18:38 I do appreciate everything that you've shown me so far as.

MEDA

1:18:41 Absolutely. I'll send you a recap of today. I'll send you a recording of this conversation pricing. Do you want me to shoot that over? Are we holding off that conversation?

JOE

1:18:52 Well, let's even though I'd like to know... I think the second go around with the owner is probably gonna be more on him. Yeah, than me, but, you know, I need to be aware of how much that is because right now, you know, I'm sure it'll be hitting my service expensive at some point, so.

MEDA

1:19:15 Yeah, absolutely.

--- Purchase decision ends ---

MEDA

1:19:16 So I'll send you all that information over. When do you think would a good time be? And I know you got to run for us to get back together with your owner or kind?

JOE

1:19:25 He's off, he's off half day Friday this week and Monday, I told the other company last, it'd probably be next week sometime. So I haven't heard back on when he's available next week. Okay? So I'm just thinking probably either next week or the week after. Okay, we're definitely gonna make a decision. So.

MEDA

1:19:46 Cool. Just let me know. I'll be in touch with you middle latter part of next week. I don't like to hound people. So I'll just touch base with you if I don't hear from you, and then we'll set that up from there.

JOE

1:19:59 Awesome. Thank you so much.

MEDA

1:20:00 Thanks, Joe. I see your phone ringing. I'll let you run. Thank you for staying late. I appreciate.

JOE

1:20:05 It. All right. Thank you.

*The End*