



ServiceTrade Demo with R.B. Lewis Fire Control Systems, L.L.C.

Brett Griffith with Pappas Life Safety Inc.
Recorded on 7/6/23 via Zoom, 1 hour 25 min.

Participants

SERVICETRADE

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SDR

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OTHER

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Transcript

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

BRETT

0:00 Hey, good morning, Tim. Can you hear me?

REID

0:01 I can hear you. Can you hear me?

BRETT

0:03 Yes, sir. How you doing this morning?

REID

0:04 You?

BRETT

0:06 Doing well. Thanks for asking. You got back with you as well, correct?

REID

0:10 I don't know if I can.

BRETT

0:13 No, your camera is not on.

REID

0:16 Okay. How do I do that?

BRETT

0:19 There you go. Got it. Nice to meet you.

REID

0:22 There?

REID

0:23 Somewhere hello?

BRETT

0:24 Hey, Beth, I'm Brett. Nice to meet you.

REID

0:27 As well.

BRETT

0:29 Well, guys, thanks for joining me today, Tim, from your email. It sounds like you're kind of on a time crunch. What I think my first question is, what's driving the, hey, we gotta do this right now.

--- *Paper process* ---

REID

0:40 The net after looking at these platforms and then seeing where we're lacking as a company, I think a lot of our loose ends will be tied up by engaging with a company such as yours to expedite and provide information to the text as well as, you know, get invoicing out a little bit quicker than the old fashioned way.

--- *Pricing* ---

BRETT

1:04 Yeah. Let's start with that last thing you just said, getting invoicing on a little bit faster. What's what's the current turnaround time for an invoice because you're on paper, right?

REID

1:12 Yeah. It's whenever we're free right now. We have 12 pages of invoicing to the TUNE of probably 400,000 dollars that we just haven't written yet.

--- *Paper process* ---

BRETT

1:21 Okay. Well, so, is cash flow an issue?

REID

1:23 No, that's the problem. If it was an issue, if it was an issue would drive me to do more, you know what I'm saying?

BRETT

1:29 Gotcha. Okay?

REID

1:30 And, it's just an archaic, long process that I feel could be done in such a better way.

--- Paper process ends ---

BRETT

1:37 Okay. Yeah, no, I totally understand that. So, just to give you a little background on myself, I've been at service trade for about four years now. I've talked to hundreds of commercial fire protection and mechanical contractors, pretty much every single person I talked to that's still on pen and paper, said everything you just set.

--- Paper process ---

BRETT

1:51 So, I've been here before. I've heard a lot of the problems you deal with. Tell me a little bit more about your current process. It sounds like you're on joy, Phil, and that's just for the inspection.

REID

2:01 That is correct.

BRETT

2:03 Okay. What is?

REID

2:04 The process? What do you mean? Exactly?

--- Paper process ends ---

REID

2:06 I got.

BRETT

2:08 So, I'm looking for, how do you, how do you get your technicians information in the field? How do you send them their inspection reports? How do they log deficiencies stuff like that?

REID

2:16 Okay. So number one, a lot of word documents like everybody comes in the morning.

--- Assets ---

REID

2:21 Number one, go to John's pizza place and do the fire learn testing here's. The lockbox code. But if I can't find that because I'm here behind, but before people, it's

well, when you get there calling me, I'll get you the lockbox number. I just don't have it in front of me.

--- Assets ends ---

REID

2:36 A lot of chasing your tail, a lot of extra time and a lot of repeat it's like I remember doing that six months ago. I went to John's pizza place here's. All the information again because if you...

BRETT

2:48 Text don't have service history, there's no way for text to get service history without calling you.

REID

2:54 Correct. They can see inspection reports with some notes we may make. But stuff from the office, you know, that is true there, there is no ability to see that other than a phone call to us.

BRETT

3:07 Okay. Got it. And then, what about the reporting deficiencies in your world?

--- Forms ---

BRETT

3:14 That's huge? How does the technician physically report it back? Do they write it on their joiful form? Do they call the office?

REID

3:20 Well, when the inspection report comes back with the deficient section, which is all the things they answered no to. And it's either a up to us to review that B on the good customers or, the new ones they come down to my office in the morning.

--- Forms ends ---

REID

3:38 By the way, when we went to this place yesterday, they're real bad. You should give them a call or see we send the report way for the customer to call. So there really is no direct way and I feel like we are missing out on some revenue because of that.

BRETT

3:52 Yeah. I would agree. There's there tends to be a lot of money left on the table with quoting when there's no way to track it. It's just, hey call this dude, and you call them, you get a voice mail and you're like I'll remember, but you never remember. I'm forgetful too. I understand it. Okay. And then I'm just reviewing the notes. Tell

me a little bit more about this thing where you said like changing code about deficiencies when they're recorded, you told Chris that on the phone.

REID

4:18 Yeah. So... I've been looking at this for probably two to three years now, right? And, and a lot of my business, is the distrust because they don't understand it. So often a customer calls me blind, says, hey, my company's been service me 12 years and they're writing me up on all this stuff. So I've been able to thumb through my competitors inspection reports.

--- *Forms* ---

REID

4:42 So, a question on the reports is, has the sprinkler system had its hydrostatic test? We click. No, right now, enjoy fill. There's no explanation provided to the customer. So all of a sudden they get a picture of a riser with you. Don't have the hydrostatic test. They call me, what the hell is the hydrostatic test? So.

BRETT

5:01 How are you guys in?

REID

5:03 The same email I wrote yesterday, the same email I'm gonna do tomorrow because we get everybody on it, if it automatically populated on the inspection report as per 25, section five, six, one, one dot one and it gives them that they can see it's not my language, not my rules.

--- *Forms ends* ---

REID

5:20 It's coming from the book, but I did an input. It, it saves me that step generally. That step is what links the agitation. What the hell? You mean? I gotta do this too. Okay? I have to do this. Get me a quote. You take that away and it hits them in the face that agitation goes away. Let's, get me a quote. I'm trying to get through that.

BRETT

5:41 Okay. I can handle that.

REID

5:45 Okay. Is that?

BRETT

5:47 That doesn't make sense? I've heard that before and exactly what you said, your customers hired you guys for rethink, they're not fire protection experts. You guys are, it's your job to tell the story, keep your customer up to date on their piece of

equipment. They have no idea what you're talking about. I have no idea what you're talking about. I have a degree, but you get what I mean? Yep.

REID

6:05 It's it's like a mechanic. When they say this is wrong, it's like, you have to believe in them, right? Because you're not gonna crawl under the vehicle and look at it because you don't know what you're looking at. So, I'm that guy.

BRETT

6:16 I got it. And you're very much talking service trade language right now because as you'll see throughout the demo today, it's all about telling the story. It's no, your customer is not going to go into their rise room and look up and say something's wrong. They have no fricking idea.

--- Deficiencies ---

BRETT

6:29 So take the pictures, take the videos, explain to them and educate them what you're doing to their piece of equipment.

REID

6:34 Correct. And the other side of this, is the lingering information, the guys come back to and I said, hey, what do we need for this? I just don't get it.

--- Deficiencies ends ---

REID

6:49 So I, one of my problems with joy fill was it was supposed to be able to be a living, you know, digital document where we could modify and add and remove stuff as necessary to make it easier on us. And they're just, they started off with a bang, but I wrote them an email two weeks ago. I haven't even got, hey, well, working on a kind of thing. So I'm starting, I need to be able to modify this as the industry moves left and right a little bit. And that's lacking a little bit. And I feel like some of the questions where we need to expand on them a little bit are all sprinkler heads in good condition.

--- Forms ---

REID

7:28 You know, there should be a thing for dry sprinkler heads or quick response sprinkler heads. We don't have that we're deriving that from one question which they think we're kinda picking them apart. You get what I'm saying yep?

BRETT

7:42 I got you.

REID

7:43 A little bit more flexibility.

BRETT

7:46 Okay, flexibility. Let me talk to you about something real quick. So ServiceTrade has a few ways that you can do forms, what I like to call the JV version and the varsity version, the JV version is essentially fill able documents. You provide us with the forms that you guys want to fill out. Your tech fills mountain field from their mobile device and that all the information comes back. The varsity version is more of a conditional logic. If I hit no, is this sprinkler free of corrosion. If I hit, no, additional questions pop up in which I can further fill out for the customer.

--- Forms ends ---

BRETT

8:18 The reason I'm telling you this right now is definitely two different versions. There's two different price points. I need to know kind of what your budget is. I don't want to show you the cataract if you can only, or if you only want to spend money on the pre, if that makes sense.

--- Pricing ---

REID

8:29 Well, I think that we, why don't you speak in generalities. So, what would be the price difference?

BRETT

8:37 So, I know, on the booking call with Chris, you talked a little bit about pricing. You went over select, you went over premium. You need to be on the premium level, which is one 39 per tech. There is an additional license fee for service forms, which is our varsity form. That license fee is 49 dollars per technician per month comes out to 588 for the year additional.

REID

8:59 Per tech per month. So, it is one 39 plus another 49.

BRETT

9:05 49. Yeah. So I don't have a calculator?

REID

9:10 180 a per tech. And the other one you said was what?

BRETT

9:17 That would be our bar set forms. The other one you could get away with being on our select plan, which is 89 dollars. We need to go through this demo to figure out

what pricing to you need to be.

REID

9:28 Got it. All right. Well.

REID

9:30 I say we start with that, you know, my goal is to be premium. I was not made aware of the forms part of this at all. So I was figuring on the 140 protect per month, but let's move through it. Let's see what you got.

--- Pricing ends ---

BRETT

9:44 Okay. I got you real quick before we get started. Like you said, you're facing potential kickback on pricing, what company you're working with?

REID

9:53 Say that again?

BRETT

9:54 You said in your email, you're facing you're working with the company, they gave you some kind of pricing deal. They might take away that pricing. Who is that?

REID

10:01 Was build on?

BRETT

10:02 Did you tell me looking at service trade?

REID

10:04 I didn't mainly because I kinda don't I'm not trying to pin anybody against each other though. They did tell me that the designers of this had some influence in service straight through the years.

BRETT

10:20 The designers of?

REID

10:21 Yeah. There were some guys that are cross trained. They were at service trade for a while and then moved over to BuildOps, maybe?

BRETT

10:27 No, they were at service tighten.

REID

10:29 Tight. I'm sorry. Okay. So that I didn't need to jump.

BRETT

10:32 No, you're good. But really Tim, I'm going to be super transparent through this process. The reason I asked that is you're a fire protection company, BuildOps? Is they started as an electrical contractor, project management software? And what we found over them growing over the past year and a half, is they're now trying to cater towards every single skilled labor industry that said they're not made for every skilled labor industry. So I want you, if you are considering build ups, you need to call reference, you need to call fire protection reference that's been onboarded in the last six months and get an honest review.

REID

11:03 And I appreciate that. To tell you the truth that was some of my hesitation to keep on looking was it was a little bit too geared to actually the hvac industry every, we were on there a couple of times with them. And every time we did a demo, it was all hvac motors, rooftop unit, hvac mock companies. It was just, I was seeing the value of it when you're really in the serial numbers and stuff like that. But that's not the fire protection industry. So, a lot of the, a lot of the glits and glamor, there was stuff that I would never utilize. So I saw it. I liked it. It was a strong platform, but what's the value of buying something if you're never gonna use it? So.

BRETT

11:50 Agree completely.

REID

11:51 Yep. So hence why we're here? So, you know, they have given me some good pricing. We beat the hell out of them mainly because they were lacking which they acknowledged they don't have forms. I was going to have to keep my existing forms online. They promise within eight months to a year. But so did joy fill when I signed with them. So.

BRETT

12:18 Don't anything that?

REID

12:19 And I agree with that. That's why we're here. They were great people, no issue with them individually. But I was really struggling to see the direct correlation between fire protection in their platform. I felt like for other trades hvac where you're up in a roof 30 stories up and they claim you didn't replace the motor here's. The serial number that's valuable to us. That's a little bit over the top. I don't need to put the serial number, a flow switch in there. It's not. I'm gonna use, you know, so that's kinda why I backed off a little bit. I have a drop dead date that they're gonna honor the pricing through. And other than that, that's where I'm at. So this didn't work out. I know I have to do it and I'm not against it.

BRETT

13:07 Okay. I appreciate you giving me all that intel. I'm gonna be real with you. If you tell BuildOps, you're looking at service trade, they'll push that data as far as you want because they do everything to beat us. That said service trade is designed for the fire protection world. And I'm not here, to talk that about my competitors. So that's all I'll say and I'm gonna be extremely transparent as far as what service trade can do, what service trade can't do... what is your?

REID

13:31 That wasn't my, I'm not here to talk bad about anybody either. I was just giving, I was giving you the, I feel so to hear, you know what I'm saying?

BRETT

13:38 Exactly. Yep. Cool. The last thing I'll say before we get started here is, you know, Brian at Brian glance. Is that how you say at Harper sprinkler? Cool? He, he reached out to their account manager at service trade and said you need to call Tim at RMB Lewis and said, okay, have you talked to him at all about ServiceTrade?

REID

13:58 Yeah. Actually he was in my office two weeks ago, spoke very highly of it. I had actually told him that I was, you know, entering, the thought process of engaging and he's like, no, give them a shot. He had it on his mobile device which we were able to play around with. I mean, obviously somebody's used it for 10 years is so quick. It can't follow them. He was able to kind of dive into some of my major concerns and also let me know where he came from, which is a large scale company that uses it. I have no reason to distrust him and, I appreciate him making the connection for me. So that's why we're here. You know, he strongly recommended it. He reached out on my behalf and then from this is where we are now. So.

BRETT

14:48 Got it. Sounds good. Well, thanks Tim. Thank you all for. Thank you for all the context. I do appreciate it. You gave me a lot of information to work off today. So we're gonna go over getting lingering information back, expecting information to the technicians, improving the invoicing time, providing Texas service history. The deficiency thing as far as code provide you with quote tracking and a lot more things that I don't have written down. But what I'll say is, hey, I'm here to be a resource for you.

--- Purchase decision ---

BRETT

15:15 You got questions, beat me up during today's, demo, let me know what questions you have, interrupt me, do whatever you have to.

REID

15:21 Okay.

BRETT

15:24 So I'll start with some slides here and Tim, and do you have a hard stop time wise? I need to be aware of.

REID

15:30 No, I was gonna try to look at a project around 12 30 so, that gives us about an hour. Okay, cool. Or.

--- Purchase decision ends ---

BRETT

15:38 Kinda depends how many questions you have. I should be able to get through the program about 30 minutes.

REID

15:42 Alright. Sounds good. We'll start with dad and we'll go from there.

BRETT

15:44 Cool. So, first things, first service trade, we're a service management program designed specifically for the fire protection industry. Been around for about 12 years. 2012. We've got 1,200 active customers using service trade every single day. Companies are coming to service trade with anywhere from three trucks on the road all the way up to 300 trucks on the road. Meaning they're coming to us to help them grow and scale their business. Which leads me into my mission statement which help commercial service contractors be more valuable to their customers and at the end of the day grow their business. But another thing that we're going to focus on for you guys essentially turning your service business into a customer service business.

--- Customer engagement ---

BRETT

16:23 At the end of the day, your customers are the most important part of your business without them. Hey, you guys don't have jobs. So let's keep them around, let's keep them coming back. And how we focus on that is what I like to call the age of online customer service. And guys, what I relate this to is Amazon prime. I'm sure you both have ordered something off there. Is that right?

REID

16:40 Huh. Cool.

BRETT

16:41 So, when you order something off there, you know, you get an email, what you ordered, when it's out for delivery, you get an email. When they deliver it at your doorstep, you get a brick and picture of the package at your doorstep. It's incredible customer service. And personally, that's the reason I haven't shopped at will Martin over five years. It's amazing I would never go at a that's the same exact level of

service we're trying to help you guys provide to your customers in the commercial fire protection space. So different things like end route notifications, letting my customer know that we're on the way saying, hey, mr, customer here's a picture of a technician that's gonna show up. He's going to be there in 25 minutes. Next step, you got online quote. As we discussed your text are finding a lot of deficiencies on site. Number one, we want to give the technicians a really easy way to identify those, take a picture, tell the story of what they're actually finding. Number two, we wanna give you guys a really easy way to generate the quotes for the customer. But at the end of the day, we're talking about ease of use for the customer. So let's make it really easy for that customer to either approve or request changes on that quote. But the most important thing about these quotes, the, pictures tell a story. Customers that are including anywhere from three to five pictures on their quotes. Those are the ones that are seeing increase of 30 to 40 percent repair revenue year over year. That's how people are seeing the ROI on service, right?

BRETT

17:57 Next up, you got service link essentially a fully encompassing post service report going up to the customer after the work is complete. So I'm telling that customer who came out, what he did, what he used. I also have any of my inspection reports, my deficiencies, my pictures here. So this is essentially going to the customer before they get their Bill. So they have no questions what they're paying you guys for once they eventually do get that Bill.

BRETT

18:21 Next up here, you have the service portal. This might be something you guys start with. This might be something you guys grow into. We got to figure that out, but it's essentially something that will go on your guys website. Like your customers can log into it. You'll provide them to log in information. They can see your guys service schedule for their location specifically, but they can also see full blown service history. So, anything that your technician does in the field after you invoice, it goes to the portal. So they don't have to call you guys. They don't have to say, what do you do six months ago? What did you do last time? I got three deficiencies, they can see it all in their portal and they can see how these deficiencies are affecting their piece of equipment. Excuse me. Didn't ask you what accounting system are you using?

--- Accounting integrations ---

REID

19:03 Quickbooks?

BRETT

19:04 Online or desktop? Perfect. Are you looking for an integration?

REID

19:10 Yes, cool. Got it. Lot easier.

BRETT

19:14 Yep. I agree. Reduce the data entry and best, it sounds like that might be on you in the office. We definitely have an integration. The only thing I can't show you today is I don't have Quickbooks desktop on my computer that said, I have a two and a half minute video of how the integration works and it shows you exactly how it flows into Quickbooks, which I can send you guys.

--- Invoicing ---

BRETT

19:30 Okay. But what I have on my screen here guys is invoice link. Service trade is in no way shape or form an accounting system. I am not gonna replace Quickbooks. So keep that. That said our customers essentially said, hey, my service information is in service trade anyway. Why can I send the Bill that's when this was created about two years ago is a way to send the Bill to the customer. Customers utilizing invoice link via service trade, tend to see about a 15 to 20 day decrease in days outstanding just because I'm able to get the Bill out, you know, same day of service or next day of service versus waiting till I process everything in the office. The cool thing here is customers have this pay now button, they click it.

--- Invoicing ends ---

BRETT

20:04 They pay you guys credit card with AC. H. We push that information to Quickbooks. And all your information is back in the.

BRETT

20:14 And to end it out here, you should know that we only work with commercial mechanical and fire protection contractors. And when you work with us, you can trust that you're going to have a good outcome because we do have a track record of success. So, of our 1,200 active customers or excuse me, those 1,200 active customers serviced over 10 percent of the commercial industrial buildings in the us last year, which accounts for 13,000,000 assets under management with over seven point 5,000,000,000 dollars invoice through service trade. What questions? Yeah?

REID

20:45 Bringing it all in.

BRETT

20:47 Understand. I'm on, I'm gonna give a lot of information there. I don't wanna, I don't wanna throw too much at you.

REID

20:51 No, this is great. I'm just, I'm writing down all my notes. So when we get, when we get to the end, I'll ask away.

BRETT

20:57 Sounds great. So first thing you're gonna see in service trade, service dashboard right here, giving you visibility into the day. So right off the bat, I have my daily schedule basically telling me here's the jobs I'm doing here's, the technicians that are doing them and there's the locations that they're going to. But this page is also giving you visibility into all of your jobs. I'm gonna say jobs means the same thing as work or we just call it job and service trade. So if you do have any overdue jobs, that appointment or letting you know front and center that, hey, you need to schedule these. These are customers that are gonna get pissed off at you because you didn't do their inspection... jobs, got appointments through the next two weeks. Inevitably, every job going to be doing at some point, might as well let you know two weeks ahead of time. So you can schedule it now versus waiting for it to be overdue... past jobs to be more complete is really important.

--- Tech On-site ---

BRETT

21:44 Essentially technician goes out in the field, does his inspection, his deficiencies, takes his pictures, whatever he needs to do. Once he clocks out of that job from the field, the work order bounces back to the office allows at to come in. Maybe she's making sure the correct parts, the labor, the job items are here, the pictures, the inspection, everything is good to once you make sure everything is good. And here, all she does is clicks a button, marks it complete from the office. It falls down to your completed jobs to be invoiced.

--- Access to information ---

BRETT

22:07 This is everything that either needs to be built through service trade or pushed to Quickbooks or about up to you guys.

BRETT

22:16 The last thing on this page is current tech location. I wanna point out this is not real time truck tracking because it is based on your technicians mobile device, not their physical truck.

--- Tech On-site ---

BRETT

22:24 But it will essentially take a Geo snapshot of where that tech is located. When he or she makes the clock of it in their app. Clock. Events can be end route onsite or job prep, and it will take a digital time stamp which I know time tracking is important to you. Any questions on this page or do you wanna save it all for the?

REID

22:42 No, that's so I can't check in on the technicians randomly just to see where they're at that's that only digitally marks them when they do what they're doing from their end.

BRETT

22:54 That when they make that clock event, it'll tell you that, hey, right, is 500 Miles from JP more.

--- Recurring maintenance ---

REID

23:00 Okay. So.

BRETT

23:02 And we'll get a little more into that as we get into further into the meeting. And then actually, for you guys, we do have the concept of offices does not have to mean individual brick and mortar offices. It could just mean different divisions within your company.

--- Recurring maintenance ends ---

BRETT

23:16 I know you do sprinklers, alarms, extinguishers, etcetera, you can set that up into different divisions so different people can see different things.

REID

23:22 Got it. Can we separate the technicians schedule? So nobody knows where each other is?

BRETT

23:29 Technicians in the field, don't have access to each other's schedules.

REID

23:31 Perfect. Great. Cool.

--- Recurring maintenance ---

BRETT

23:35 So, I'm gonna get into kind of our data model just to explain how service trade works, then we'll get into the actual workflow. But I do think this is really important. So because we are built for commercial and industrial contractors, we're based off a ship two and a Bill to data model. In this case, JP Morgan headquarters is my Bill to under that I manage two locations, whether it's two locations or 200 locations. They're going to be listed out for you. JP Morgan is the ship to or the service address that I'm delivering service today, Tim, I put you as my primary contact. I'm gonna track every contact at this location. So when it is time to send the quote or the invoice, I have all the proper contact types... services though services is anything I'm actually gonna deliver to my customer, whether it's repairing an efficiency. It's a recurring service. It's project work. It's gonna be here. As you can see right up top. I've got my F a 25 quarterly wet sprinkler inspection. What I have highlighted your guys verbiage inside the service trade, if you want to be this descriptive, great. If you just wanna say in a 25 what sprinkler that's fine too, but you guys are going to set

these up on a recurring basis that you come out. So if you guys focus your eyes specifically on these two tabs right here, how large is the services scheduling window? Do I have to get it done today? July sixth? Do I have the whole month of July or is it a custom date range in which I have to do this inspection? And then how often does this occur? I hit monthly. And then I said repeat every three months making this a quarterly service to make it a semi annual. I'm gonna go six months there's. The own annual tab here. You can kinda set up the recurring basis that you need to for your services.

--- Assets ---

BRETT

25:03 Makes sense. Yeah. Cool. Under services, you, assets are the physical pieces of equipment that you manage for your customer? Do you currently track this kind of information? Whether it be, you know, make model?

REID

25:18 No, no.

BRETT

25:20 Do you want to?

REID

25:21 Well, I don't really see the value of it to tell you the truth. So I, I'd like for you to walk me through what you're doing right now and then maybe I can draw a correlation.

BRETT

25:31 Yeah, I got you. So I set some service trades exactly that piece of equipment you guys work on. So let's take this alarm device right here. I've got all this information. I track on it. The reason I track it is, so I don't have to send the technician out to location every time I wanna know something about this piece of equipment. I'm tracking it in my system. But the further purpose beyond this is service history. We talked a little bit about that. If I click onto this individual piece of equipment as someone in the office, I can see every service we provide, every work order here's. Every service we provide on this piece of equipment here's. Every work order we have completed with dates, everything's hyperlinked, you can drill down deeper into it. But also every efficiency on this piece of equipment is here, every quote provided for the customers here. So instead of flipping through file folders, and, you know, all work orders, paper work orders, all that stuff. Every single piece of service history is right here. I go to one place in service rate. It's that customer specific piece of equipment. Does that make sense? Yup. And so what I'll tell you is along the lines of assets, typically before using service trade, most customers do not track assets, but service trade gives them the ability to track it. And the cool thing is your technicians can add these from the field. So if they want to do something as simple as throw in the make in the model, you guys can track it and you can say, hey, I did these services. I found these deficiency. It doesn't have to be as detailed as this.

REID

26:50 Okay. Is the only way to get a deficiency is to enter the asset.

--- Deficiencies ---

BRETT

26:57 So when you're logged or do you mean that from the office or from the field?

REID

27:00 I'm talking about, I go, I'm an inspector, I go out there and I say your main water flow switch failed, right? Do I have, to be able to show that as an efficiency to my customer? Do I have to create an asset for at first?

--- Assets ---

BRETT

27:12 No, we will default to the building if you don't track.

REID

27:15 Got it. Okay.

BRETT

27:19 Under assets at this location, you will have a list of every deficiency. Just as you ask that question. For example, this grasping ahead was tied to the building it was on June first 21.

--- Assets ends ---

BRETT

27:29 Got it. You got a list of every quote here as well. Everything's hyper length. You can filter out. If you wanna see anything that's maybe not approved. This is a demo account. So everything's been approved. But last thing I wanna point out is, contracts and service trade are essentially pricing structures.

--- ST app contracts and pricing ---

BRETT

27:46 So customer A might get a structure, customer B might get a structure. Essentially, it's different mark up rules. Is that how you apply to your customers? Beautiful, you can have as many contracts as you want. Right here. You essentially, when you're setting up customers, you'll a contract to them. So when it is time to quote them or to invoice them, the proper mark up rules apply and you guys don't have to do anything.

REID

28:05 Can I control it and override it? Absolutely? Okay. Perfect. So it basically creates, it creates a formula that's flexible. So if I came up with 1,200 bucks, but I wanted a 1,000 bucks, I could override that and get it to where I wanted.

BRETT

28:21 Exactly. When you're making the invoice, you can override anything. It will flag it and say, hey, the contract price is this but you just overrode it. Okay? Any questions here?

REID

28:33 Yes, but keep on.

BRETT

28:35 Got it. Cool. So, I'm gonna work, I'm gonna jump into an inspection job that I set up for us today.

--- Tech On-site ---

BRETT

28:40 I'm gonna show you from the office. I'll jump out to the field. We'll be a technician. I'll do that workflow will come back. Well, closes out invoicing. So, what I set up for today is we're doing both a sprinkler inspection and a fire alarm inspection. This is just showing you that you can put multiple services on one ticket.

--- Tech On-site ends ---

BRETT

28:58 So if you're doing the extinguishers, the alarms sprinklers don't make three tickets. It's a waste of time. It's gonna confuse your technician. Just do this. All I did there is I release the appointment. We have the concept of released and on released appointment release means the technician can see it in the field on released.

--- Quote templates ---

BRETT

29:14 Is I scheduled it, but, I don't want my technician to see what they're doing yet, maybe a week ahead time... below this. I have my part of my labor, my items broken up by individual service right here. These are going to be your guys, parts of your guys prices in your service trade account.

--- Tech On-site ---

REID

29:29 Does it is or is this office right now?

BRETT

29:31 This is office right now. Excuse me.

REID

29:33 So, I gotta see what I'm getting.

REID

29:34 For...

BRETT

29:35 Him. No, and everything's permission based. So you don't want Texas pricing turn it off, they can do everything else. We will go over clock events once I get back to the office because I got to go to some clock events here's.

--- Assets ---

BRETT

29:47 The assets we're working on today. There's no deficiencies yet. There's no attachments that's gonna change. One other thing you mentioned earlier was like gate codes, we use comments for that. So, hey, every time you go here, bring a 20 foot ladder or the gate code is three four five six that's on the work order.

REID

30:03 And that's there forever until we remove it.

BRETT

30:06 Yeah. So the cool thing is you can make job comments, which anytime there's a job at this location, they'll see it or you can make service specific comments with this service today, June July sixth?

REID

30:17 Got it. Okay.

BRETT

30:21 So, it's got to the field, I'm on an iPad right now.

--- Access to information ---

BRETT

30:23 I know you asked Chris if we're we work with, Alex is android. So we're compatible with android and apple devices.

REID

30:29 Perfect. What about?

REID

30:31 Is Sam sunny android? Yes. Got it.

BRETT

30:35 Just, no, the only thing we don't work on is like those windows surface tablets they use like in the NFL. No, those don't work. Got it. So this we are now in the mobile application. Like I said, I'm on an iPad. So it is simply an application on your device. I'm gonna click into this job. And the first thing I might do as a technician is maybe I'm driving the location.

--- Tech On-site ---

BRETT

30:55 I have my clock events down below. Maybe I clock in and route and I notify my customer that I'm on the way. So, Tim, I'll send you a notification. You can see what it looks like after the meeting. Perfect. From there, my clock out of and route and a clock in on site. This is tracking my hours in the background. This is where I get my digital time stamp. As far as your technician. He's on site. He's clocked in and he's ready to get to work. What is he performing on site? He's clicking up into services is telling him that exact verbiage that you just saw from the office as far as what he's performing on site today. As we just talked about, you don't want text to see pricing, turn it off. It's permission based?

--- Pricing ---

REID

31:32 Can you leave the, can you leave the hours that I want him there? I see you have two hours above 500 dollars. Can we leave the hourly but remove the price? Absolutely nice, so they know it's a four hour inspection, get it done.

BRETT

31:46 Exactly. Got it... below services.

--- Deficiencies ---

BRETT

31:51 You got attachments. This is where your technicians are gonna tell the story of what they did on site. Like we talked about, your customers are not experts, your technicians are. So maybe as the tech, I come in here, I take some pictures of what's going on. Maybe I'm doing before and after it's up to you guys, whatever you wanna do, but you can do pictures, videos, audio recording, anything that's helpful... below attachments.

--- Tech On-site ---

BRETT

32:13 You got job items. This is the material that we're using on site. All of this was initially on the ticket. We know the inspection job. We know what we typically use on this inspection job. If it's a TAM or repair job, your technician might come in and add parts in as he sees fit.

--- Quote templates ---

BRETT

32:27 This is your guys part list. So as he's searching, maybe he's looking for a widget, he grabs that widget... adjust the price. If your technician doesn't have price, this will just say zero and we'll simply add this in. This is just making sure you guys Bill for the correct amount. When you do send the invoice.

--- Parts management (inventory) ---

REID

32:43 So basically the text there, we need to add 310 pound abc extinguishers. It's in his book, he doesn't care about price. He just cares about the materials he uses. He adds all that stuff up and that's gonna populate later on. When it gets to me.

BRETT

32:56 Exactly your text, they're doing skilled labor.

--- Pricing ---

BRETT

32:58 You pay them so much brick and money to do their job. It's not worth them. Typing in. This part was 12 dollars. This one was nine dollars that's a waste of time. Let them do their jobs and let the office do admin.

REID

33:09 Question. So typically if they're switching out extinguishers like, that would be additional labor.

--- Quote templates ---

REID

33:14 Is there a way for them to put? You know, it took me a half an hour to go up to the band and grab the extinguishers, swap them out. Is there a way to put that as additional and not on the inspection?

BRETT

33:24 Absolutely. So as you can see here, like I have labor rate alarm, you guys can have different labor rates. So I can come in and I don't know what I have in here, but let's find out. Let's see labor rate alarm. I'm gonna come in and I'm gonna say, hey,

this took me two additional hours. You see there's no price there because on this item, I don't have pricing, I would simply add that in.

--- Quote templates ends ---

BRETT

33:44 And then when it comes back to you in the office that you're gonna see that, hey, there's two additional hours of labor here. Let me go look at the notes and see what happens.

REID

33:53 Love it. So we can, I could send him with the parts I think I need. But then he could add in, hey, you forgot the nuts and bolts and he could drop those in as, okay, perfect. Different additional labor?

BRETT

34:04 Exactly.

REID

34:05 Perfect.

REID

34:06 One more thing for typically, they'll take notes of what do for next year so they can come prepared. Is there a way to do that as well? Like, you know, free 10 pound abc do next in 2024?

--- Tech On-site ---

BRETT

34:16 Yeah. So, you saw comments from the office, but technicians also have comments in the field. So technical see everything you guys saw from the office. But maybe I wanna come in and say, hey bring three. If I can spell... we're running out of time. So I'm just gonna leave, that is, but technicians can leave any comment they need.

--- Assets ---

REID

34:36 And now, will that automatically be on the next year's? Service? Say we go back to the inspection again? Is that going to travel with it?

BRETT

34:43 So, earlier, I used the wrong terminology as far as job and service comment. A job comment is today specifically a location comment. Is it'll be there for its entirety as long as...

REID

34:58 We want it so that they can see it next year yep?

REID

35:04 On one second, stupid question. But if we were to subscribe to this, do we get tutorials for ourselves and our guys in perpetuity as much as we need, or is that an additional cost?

BRETT

35:17 As long as you guys are subscribed to service trade, you have training?

--- Assets ---

BRETT

35:21 So, yes and best to answer your question, right up here, it says comment for and you guys get to kinda pick, is it a job comment? Is it a location which it will stay here forever or is it this service? This recurring service? Got it. So I would say location?

--- Recurring maintenance ---

REID

35:36 What's the difference between job and service?

BRETT

35:38 Job is today's. Physical appointment service is the recurring aspect of the service the fda 25 that we go out on.

REID

35:46 So that would essentially show up next year as well if they did it under service.

BRETT

35:49 It would, unless for some reason maybe that customer isn't under inspection contract for that service next year. So I would leave it at the location just so it's in fact there. Okay.

--- Access to information ---

BRETT

36:05 Assets as we talked about from the office technicians do have visibility into that. As you mentioned Tim service history. If the text don't get the information before they leave the office in the morning, it's a phone call to the office. It's a waste of time for your technicians.

--- Assets ---

BRETT

36:17 They could click into this asset bucket right here and say, hey, I'm working on my notifier system. Let's see what I know about it here's. The information, I know about this piece of equipment. I also have full blown service history. So, I was doing a lot of testing before here's.

--- Recurring maintenance ---

BRETT

36:31 Every inspection that I have done at JP Morgan on this alarm system. So if I want to go back to Thursday, go to June ninth... here's. The work order that the technician did on June ninth, you can see what services he performed. You can see what technician physically did it.

--- Forms ---

BRETT

36:45 If he took any pictures or filled out inspection report, they would be here. That example, I don't have an action report here, but all the information would be here for your technician from that last service.

REID

36:56 Okay.

BRETT

37:00 Now... let's go into those inspection reports. Before we get there. You can see there's a bunch of buttons here. You see, generate invoice. If you don't want your tech to generate invoices. Again, permission setting won't be there. So under view more details, we're gonna do exactly that. It's gonna show me some more information. And what we're gonna do is we are getting into as I mentioned before, the JV version of forms, which will keep you within budget. And so if I go actions, go download blank paperwork, how's it gonna work? Is we're going to have your guys forms that you need your technicians to fill out? Essentially, they're going to be labeled correctly, and this is a demo account. You guys are going to be a little different. We, that dispatch rules. If it's an alarm job, they get their alarm form. If it's a sprinkler job, they get their sprinkler form, so on so forth. So in this case, I'm just gonna go ahead and select one of them. So I can show you how it works. Excuse me, right? Generate what we do here is we open this up via Adobe acrobat. Adobe now allows us to smart fill these forms. And what I mean by smart fill, we talked a little bit about your technicians are an expensive resource. There's no sense in them typing all this information. So all this information smart fills from your ServiceTrade account, for example, Tim, or by contact you fell onto here automatically text don't have to fill any of this out. All they have to do is physically fill out their form.

BRETT

38:15 You go through, fill out everything you need to fill. If it's checking the box that looks like that. If it's free form information, looks like that... look good?

REID

38:25 I...

REID

38:25 Guess, are these forms? So.

REID

38:29 No, I...

REID

38:29 I see that you just imported some information. Is that including all about the systems?

REID

38:36 No, this is just the.

REID

38:37 Home made one.

BRETT

38:38 If you have, if you track the asset information in service rate, it can pull the asset information. I picked a bad form because it doesn't have room for asset, but you guys need to track the asset for the asset information to flow onto the form.

REID

38:53 Yeah. What you're asking, is this the form you guys are?

REID

38:56 No, but say we filled it out one year. Obviously, they'll have to fill everything out. Is there a way to import last year? So they don't have to put the same sprinkler size, all that same information over every year.

BRETT

39:08 If you guys track the assets in servers trade, that information will pre fill.

REID

39:12 Got...

BRETT

39:13 It then.

REID

39:14 So basically, they'll have a carbon copy of last year's sprinkle report and they'll have to change anything that's been changed since last year. So pound static, it'll be 75. But if it didn't change, it'll, just be the change of the data in the end.

--- *Forms ends* ---

BRETT

39:29 Exactly. They will have to save another copy to say, hey, this is July sixth 2023 because this is the old version.

REID

39:35 Yeah, we don't want to overwrite the old version we wanted to. So now, where is all this store as part of this cost of cloud space for you guys?

--- *Pricing* ---

BRETT

39:43 The, the price I gave you as far as the 89 dollars or the one 39 select and premium, everything's included in that we are based or we're hosted on Aws, the same thing banks netflix hulu, all that uses all that is included in your cost.

REID

39:58 And I still own the report.

--- *Pricing ends* ---

REID

39:59 So if we do business for 12 years and then I decide to move on, I still have that information is mind, correct?

BRETT

40:06 These are your guys reports. We're gonna take your guys reports and put them in of 1,200 customers that's really hard, for us to keep track of every single form. So we're gonna take your forms and put them into ServiceTrade. So, yes, you always own them. And that brings up another good point 12 years down the road. Do you leave service trade for a Chinese new software? It's your information. We simply host it. You guys own it.

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

BRETT

40:26 Perfect. So all I'm gonna do with this form is I'm gonna hit the three dots top as the technician. I'm gonna come in here and add this back to service trade. The cool thing is service trade knows where I'm clocked in, it says, hey, you wanna add this to JP Morgan, you're clocked in there?

--- *Deficiencies* ---

BRETT

40:40 I'm gonna say, yes, we're going to go ahead and upload it. So when I hop back to my ServiceTrade application, that form that I just filled out is going to be under both paperwork and attachments. Right at the top. That information is also flowing back to the office, but let's talk about efficiencies. My technician found a corroted sprinkler head, let's go under deficiencies right here and log it... come in. I say, I found it.

REID

41:06 Corroted...

BRETT

41:08 Sprinkler head. I don't have to be crazy descriptive with this why because I'm gonna come behind it and add more detail. So I save that in maybe I go ahead and that take my attachment. So, yeah pictures are great. They tell a story, but maybe I wanna take a video this time so I can talk through it and I can say, hey, Tim, look at this corroted sprinkler head. I gotta do XYZ to fix it. It's gonna take me three hours. I need a 30 foot ladder, whatever they need to say. Again, they're telling that story to you guys in the office that are gonna physically quote this, that are not physically on site, understanding what the problem is.

BRETT

41:43 Add those in, save that in. And then you guys kinda can pick and choose what you want required here. I'll go through everything so you can see it so you can mark the severity. Is this an inoperable deficiency is deficient or is it just suggested for my customer? I'll call it deficient today? The asset. Again, if you guys aren't tracking assets, we'll just select the building as a default. If you guys are tracking assets. Great. We'll tie it to that piece of equipment. The service line is just the type of work you guys are performing. So I'll come in here and I'll say sprinkler... and then lastly, the status new is, hey, my customer has no idea about this fixed. I fixed it on site. Verified. All that means is I send a quote to my customer and they're where however we have not fixed it yet. So I'm gonna mark it as new so we can quote it out if your tech has a proposed solution. Great. Put it in if not leave it blank, let the office figure it out. And I'll simply save this in... questions on that process.

REID

42:40 No.

BRETT

42:41 No. Okay. Are you guys getting work signed off on before you leave location?

REID

42:47 Sometimes, yes, sometimes no, it's purely customer specific.

BRETT

42:51 Gotcha. Okay. So maybe you have a comment that says work needs to be signed off for this customer before leaving. And in that instance, customer technician will come in and say, create work acknowledgment, essentially, they'll say, hey, Tim is my contact as the technician. I'm gonna go through all these fields right here and make sure everything is accurate. Again, you guys won't see this if you don't want it there. What the technician will do is they'll hit review at the top. They'll hand their device around to the onsite contact. So, Tim, you're coming in, you're clicking in all these fields, making sure everything is accurate.

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

BRETT

43:20 You're agreeing to be Lewis TS and CS and you're saying, yeah, this is all true. I'm gonna pay you guys, Tim, your information is correct. I'll send you a copy so you can look at it later, but I'll get your signature and we'll move on.

BRETT

43:36 Questions?

REID

43:38 No, it's almost effortless the way it covers all the little nuances, or annoyances, what I think is a better term of business.

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

BRETT

43:47 It's almost like it was made for your business.

REID

43:50 Yeah. Where's my ability to log my hva steam older?

BRETT

43:55 I can do that, but it's a whole different look.

REID

44:03 Yeah. Well, then you said what you can generate a quote from there?

BRETT

44:06 Yeah. So, I'm gonna take you guys through the process as far as generating the quote. It's you guys in the office, making the quote, not your tech, right?

--- Tech On-site ---

REID

44:12 Right?

REID

44:12 Generally.

BRETT

44:13 Beautiful. So, let's clock out of this and let's show you how that works. So, all I'm doing here is as the tech, I'm saying, yep, finish the alarm service, finish this one hit. Next. Are you done with this visit? Yes, means, hey, it's gonna go to the office. They're going to go and fill it. No means I gotta come back. Maybe I got to go grab a part. I'm going on lunch, whatever it is, when or if you hit, no, you can leave a comment as to why you need to come back as well?

REID

44:37 Perfect.

--- Tech On-site ends ---

REID

44:37 Is that say they're not going to go back the same day, right? They still need to go back, whether it be two weeks from now or whenever, right?

BRETT

44:44 Exactly. Maybe it's hey, I had to order 10, 10 sprinkler heads. Hard shop doesn't have them. So we get to come back in a week.

REID

44:51 I just got your work acknowledgment.

BRETT

44:54 Yeah. How's it luck?

REID

44:55 I haven't opened it yet. Okay. Fire, fire.

BRETT

45:01 Yeah. You like our dummy account?

REID

45:02 Yeah... it's perfect. It's what I'm seeing. Okay?

BRETT

45:10 Yep. Cool. I'm gonna send you a few more emails as we continue going through this. I got 15 minutes till 12 30. I might be able to get through a...

--- Tech On-site ---

REID

45:17 It's all right. I'm not gonna rush. They can wait for me.

BRETT

45:20 Beautiful. Thank you. So we're back on this inspection job. Same job number we just worked on. What has changed right now? Is job status currently says in Progress however down or appointments? It says completed that's because my technician physically said, yes, I am done with these two appointments right here.

--- Dispatch ---

BRETT

45:35 If you guys remember the service dashboard and you remember that past jobs you marked complete, this job we're looking at is currently in this bucket where best is coming in, reviewing it. So I'm coming back into this job, I'm saying it looks like Brett added two hours of labor not tied to a service.

--- ST app contracts and pricing ---

BRETT

45:50 He also added a widget and I open this up. I might make sure my pricing is correct. You asked earlier, if I can manually override this. So it was two 35. I'm gonna change it to 300. It does flag it and say your standard cost is two 35, but you're more than welcome to manually override anything.

--- Tech On-site ---

BRETT

46:05 I might also drag these down to the service. So more for job costing reasons, you know, when you use the parts and what you use them for. So you make sure your pricing is correct here's. Your clock event, JP Morgan in New York. I'm in North Carolina. So you can see that I was 534 Miles away when I both clocked in and route and onsite, you can click on that, see exactly where the technician was located. But to answer your question before, no, it's not gonna track that truck in real time.

--- Deficiencies ---

REID

46:33 How do you separate billing for taxes? Is that in the screen or is that going to be something different?

BRETT

46:38 That's gonna be once we get the invoicing.

REID

46:40 Got it. Okay.

BRETT

46:44 Whenever assets deficiencies, let's get into that quote. Here's. That deficiency is just reported corroded sprinkler head. This is not the only way that you guys are going to get notified of it. You will get an email notification and it'll look like this. Hey, deficiency reported at JP Morgan, meaning you don't have to sit inside service trade, refresh, fresh till stuff comes through. You'll get notified. I click this link right here takes me right into service trade. It says, hey, Brett found at corroded sprinkler head at JP Morgan. Here's, what he found four minutes ago. Here's any related deficiencies on this piece of equipment. You can see, I have quite a few corroded sprinkler heads in the past two years. I wanna look deeper into that. But as far as attachment, hey, there's my video there's, my picture, my technician took on site.

--- Quote templates ---

BRETT

47:22 Whoever is doing the quote, look this over, get a better understanding of what your technician found on site. So when you do go to generate the quote, you know, what you're quoting out. So I'll throw an expiration as you guys know, prices are changing like crazy. We'll generate this quote. Now, Tim, in response to the question before, as far as we found a deficiency, we want the proper code, to be presented to my customer. My recommendation is service trade is not going to provide you guys with the code that said we have the concept of quote templates. And what my customers are doing is when they're setting up their account, they're putting in all these different types of things that they quote out. For example, a corroded sprinkler head repair. And this has the section of the code that correlates to the deficiency at hand. And these are just quote templates. You set them up in your account, whatever you want, general description of work along with the parts labor, job items you expect to use. Is that okay?

REID

48:17 Yeah. Give me one second. So we go out there and we find four different deficiencies. Do I have the opportunity to link each deficiency to one of those templates? Or is the template... you were not?

BRETT

48:31 Link each deficiency?

REID

48:33 So, say, I wrote you up on a corroted sprinkler head and then a flow switch. It didn't work. Do I have the ability to do a template for the corroted sprinkler head? And then apply another template to the failed flow switch?

BRETT

48:48 Yes, you will just have to come in and physically like break it up and put like a line break.

REID

48:54 Okay. So you could add another template down there on that cursor if you wanted to correct. Okay. So you can put as many templates one under the other as you want to.

BRETT

49:03 Exactly. And that's in line with you can add as many services or deficiencies on this quote as you want.

REID

49:08 Thank you, sir.

BRETT

49:09 Absolutely. So down under my part, my labor items open that up. You can see, you can pick the level of detail that your customer sees. So there's 12 different options here, you pick and choose what you want and you'll set this up as a default.

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

BRETT

49:21 When you get set up, do you want to just show grand total only my items, pick it up to you. Yep contract. This is the pricing contract that we picked before. So when I change it, you can see my unit price changes, it's based on those mark approvals.

--- *Accounting* ---

BRETT

49:36 And then tax will be in your service trade account. We use avalere, the major tax company that's where we get our tax rates and codes based on the jurisdictions you guys work.

REID

49:46 Got it. What do you got from Massachusetts?

BRETT

49:48 I have no idea but alert knows, okay.

REID

49:51 Got it like already. And it tells me the gross margin on the job.

--- ST app contracts and pricing ---

BRETT

49:56 Exactly. You guys are only gonna see that customers never gonna see it. So it's kind of like a fail safe before I send this out, we need to be above a 40 percent margin. If I'm not going to.

REID

50:05 Okay. Now, here's, another question. I send a lump sum by customer 22,000 dollars, then they ask me to break it up as easy as going back to this invoice, just changing the configuration and re sending it in 30 seconds, exactly, right? That saves so much time.

--- Quote templates ---

REID

50:20 Can each item be taxed or not? Or is it the entire quote going to be taxed?

BRETT

50:27 You guys get to pick and choose what's tacked. Do you also have the ability when you set your items up to mark them as taxable items or non taxable items?

REID

50:34 So basically, for lack of a better term, we're building a price book, and this price book is every time we run into a new part, the minute we enter it, it's there forever.

--- ST app contracts and pricing ---

BRETT

50:45 We have to.

REID

50:45 Adjust the pricing as the cost move around, but it's always there. So starting from zero, we're going to enter it. But come this time the first year, we're going to have a pretty decent price book of our common stuff setup.

BRETT

50:57 Exactly, right. And that's definitely a way to do it.

BRETT

50:59 What I'll also tell you some customers do is they'll just go to their vendor and they'll say, hey, mister vendor. Give me every part, every price I bought from you in the past three months, six months a year or whatever it is. They'll take that list and bulk import it into service rate. So it's there, you might have to change pricing that's fine pricing is always changing.

--- Accounting ---

REID

51:15 I get it. I get...

REID

51:16 It, but you can import all of the parts and pieces with their prices from the vendor.

BRETT

51:21 Absolutely.

REID

51:22 Manually or digitally.

BRETT

51:25 It'll be a bulk import manually.

REID

51:26 I...

REID

51:27 Got it.

BRETT

51:29 No, it's not gonna be type every single thing in it's. Gonna be here's. My excel sheet that Ferguson sent me my vendor and I'm just gonna copy that CSV into service trade and it'll import everything.

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

REID

51:40 Good. That sounds great. I see. Protection.

BRETT

51:45 Cool. So from here, let's send this out to my customer. Tim, you got your email up. So before I send this to you, I'm gonna pick and choose what's going out to you. Maybe that video, you know, Brett curse a little bit. We don't want to send that, turn it off. That said the picture tells the story, include it. Your customer wants to see it. I'll send it to both you and me and if you can pull that up and see what it looks like, I'm gonna actually ask you to approve the quote, but I'd love to hear what your thoughts are on it.

REID

52:12 I think I got, it. Takes me a second for me to get it on.

BRETT

52:16 You're good? I also send it to myself if it's quicker for me to pull it up. Okay? So, right here, I got this quote for a pair. Your customer is gonna see, hey quote from AB Lewis, your guys logo, and they're gonna see a kind a description of the quote. They hit the on respond and this is what they see. So, wait.

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

REID

52:35 No, they're calling me up my cars, extended warranty.

BRETT

52:40 Yeah. Honestly, when I got nothing going on, I'll kill those people to 20 minutes.

REID

52:44 That, it, I go on and on, I don't wanna push you through it.

BRETT

52:48 I appreciate it. But here's our quote right here. I just opened it up via email.

--- Quote templates ---

BRETT

52:53 I'm the customer right now, looking at it. I can say here here's, that description of work that you put on there here's, the parts labor, the items, the service I'm fixing, customer can see, they owe me 261. They can see pictures of my code sprinkler head, everything that's going wrong.

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

BRETT

53:07 Again. You're telling that story to the customer. The customer wants to approve it. They hit approve. They have the ability to put it in a po number. You guys can make it required that they put it in a po number. If you spend a lot of time chasing those down does not have to be required.

--- Quoting ---

BRETT

53:21 So I'll leave that blank. I'll check this off. I'll say, yeah, I confirm it and we'll approve the quote. Customers gonna get this nice little stamp saying it's approved. You guys are going to get an email that say, hey, your customer accepted this quote. It's also gonna show up if you run a quote report inside of service rate. So, what happened there is, I'll do a quick refresh quote status went from submitted to approved. I have this history right here. I can see Brett on the field adding, that video, that picture. I sent it to both me and you, but I was the one that viewed it. This is my IP address. I viewed it at 1,222. I approved it at 1,222 on July sixth. So especially in the fire protection world, quote history is important at the CI world. Customer tells you, Tim, you never sent me a quote correct by. You can say, hey, I sent you last week. You looked at it six times. You just haven't approved it... from there. Really easy to add this back to an existing job. Maybe I'm going to JP Morgan on Friday, great. Add it to that job, reduce the amount of truck roles to that location that's not the case. Create a new job from the quote, throw in a due date. Say, hey, this is due by July 20 seventh. I'm gonna copy over every attachment and every comment and we're just gonna create a new job. Last step is to actually schedule this which we'll get into... questions.

--- Customer engagement ---

REID

54:30 Now.

BRETT

54:33 That right there, that whole deficiency into quote. I call it the deficiency loop. But the deficiency into the quoting process. Like I said, it's the number one way that our customers are seeing ROI. Most customers find that when they come to service trade it's so brick and easy to log deficiencies.

--- Customer engagement ends ---

BRETT

54:47 Yeah, their technicians can log one more deficiency a week. I'll show you. I'll send you an email with what the ROI can look like on that. But do you think your tech could one more deficiency each?

REID

54:59 Per week?

BRETT

55:00 Yeah.

REID

55:01 Yeah, I think that that's especially with the way is moving where there's you know, interval requirements. Now. I think it's no brainer.

--- Tech On-site ---

BRETT

55:08 Exactly. Got it. Perfect. Okay. Let's go back to our job. So we went over our road to sprinkle our head under attachments here's. That paperwork that I filled out on site so you can see the changes I made. You guys can review this as you see fit. There's the picture I took. And here's the work acknowledgement that I sent to Tim that you got in his email. I got your signature down to, excuse me. So as you guys are reviewing this, you're making sure everything's correct. My prices are all good. I realized I don't have an inspection fee in there.

--- ST app contracts and pricing ---

BRETT

55:39 So let's throw under bucks in there. Save it. All I'm gonna do from here is I'm gonna complete the job. I'm gonna say, yup, everything's done, complete it, create the invoice. This page right here allows you. It's strictly for you guys. It's not for the customer but it's make sure your pricing contract is correct, and make sure your unit cost is correct before we apply any markup rules.

--- Invoicing ---

BRETT

56:00 So your prices make sure they're correct? I'm gonna go here, work good, simply create the invoice... here's. My invoice. It's my pro forma invoice inside of service rate. It's almost ready to be sent to the customer before it is. I might open this up. So I might just want to check over my mark up rules, make sure everything is accurate.

--- ST app contracts and pricing ---

BRETT

56:18 I know that I want to be at a 40 percent margin. So maybe I mark one of these up manually and I get that 40 percent margin. And again, similar we...

REID

56:26 A quota job. What happens if the, if you kind of to get, you know, I come in at 2,200 bucks to like, hey, we got your competitor came at a two grand. All right. I'll match their price. How do I override this to get to the two grand? Or can I not do that?

BRETT

56:40 I would put a discount in.

REID

56:42 Got it. Okay. Makes sense.

BRETT

56:44 Perfect. And again, that's all broken up by services that you guys want to perform. And as you asked before, I don't have mass stack right in here.

--- Accounting ---

BRETT

56:52 I don't know what it is but it would be based on the location of, the ship to. So we save this in.

REID

57:02 Populate. If I put in, we worked in Boston, Massachusetts, it'll automatically populate the current tax rate. Well, that's handy. Screw it up.

BRETT

57:11 Exactly. And it's based on zip plus four.

--- Invoicing ---

BRETT

57:13 So it gets pretty granular. Wow. Yeah. Okay. So pro forma invoice right here, if I want to send it through service trade, which is what I recommend. Like you said your turnaround time talks for lack of better term. So let's fix it. Like I said, I'm transparent. So I'm gonna send this to both you and me.

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

BRETT

57:33 I'll pull it up on my screen just so you can take a look at everything after I'll actually pull it up right here. So again or Lewis logo at the top, all the information going to the customer here's what I did for them. You guys again get to pick and choose how you want to break it up. If this is too much detail, pick something else. The customer sees that they owe you about 1,600 bucks. If they have any questions, they can go to this service details right here. This pulls up their service blanket. It's on every invoice link that goes out. That's why I recommend using the invoice via service rate because they get so much information. So they can see that, hey, R Lewis came out Thursday July sixth. Brett was my technician here's. What he did on site here's. What he used on site. You guys get to pick and choose if you want to include this or not for the customer. But as far as attachments, hey, mr, customer here's, your inspection report here's. Where you signed off on the work I did and here's all the pictures I took for showing that customer every single thing I did... when I go

back to invoice, customer can hit pay now and they can pay you guys for the credit card or with AC H, you can set monetary limits.

--- Invoicing ---

BRETT

58:31 So anything over a 1,000 dollars has to be AC, H, can't be a credit card up to you? However you want to set that up?

REID

58:36 What? As if we don't accept credit cards that just goes away?

BRETT

58:39 Yep. You pick and choose what you want to accept?

REID

58:41 Great. Thank you.

BRETT

58:43 Absolutely. So they can pay you. If they pay you a service trade, it's gonna come back here down under payments. It's going to reflect the payment. And then you were gonna transfer this over to your accounting system. I'm gonna send you a accounting system. Like I said, I don't have Quickbooks on my computer. So I'm not gonna physically send this, but I will send you guys a video of what it looks like. I'll write that down right now.

REID

59:03 So, that would send the invoice itself over to Quickbooks?

BRETT

59:07 Yes. So Quickbooks essentially create a corresponding invoice to match up exactly with what you're seeing in service trade. So, you guys have the record keeping, you can do everything that you need to do in Quickbooks. That said, if you don't want to send the invoice via service trade, you can just hit send you accounting system and you guys can Bill it from there. Okay? You got 10 more minutes for me to show you scheduling?

--- Deficiencies ---

REID

59:29 Absolutely.

REID

59:32 I have one question just regarding this. So say they went and remedy remedied an efficiency. Does that automatically remove it from anywhere or do we have to

manually do that?

BRETT

59:45 When the technician goes to fix the deficiency, they'll mark it as fixed on their device and it'll go across everywhere it's at in your service trade account and mark it as fixed.

--- *Forms* ---

REID

59:53 Including on the report... or the.

BRETT

59:57 No, not on the report because this is our JV version of.

REID

1:00:05 That on the premium version, yes, it'll automatically take it off of the report.

BRETT

1:00:14 It'll automatically. It won't take it off the report, but it'll change the status to.

REID

1:00:18 I like resolved. Yes. So, okay. Okay. But not on the JV version, we'd have to manually do.

--- *Pricing* ---

BRETT

1:00:25 Exactly. Okay. So that's the conversation. Is it worth paying the additional X amount of money? I gotta figure out how much it is, for you guys. It's probably like six grand a year. Is it worth paying that? Or is it okay to go back and manually change?

REID

1:00:42 It's...

REID

1:00:42 Not working great for us right now.

REID

1:00:44 Yeah, I know. I think for, you know, if we're gonna spend, I did the math for nine, isn't it, the offices comped, right?

BRETT

1:00:55 Great.

REID

1:00:57 So, I've got nine techs on the road that I want to have this in their hand times 188 dollars a month would be 1,692 a month. Times 12 months, would be 20,304 annually. With the value of the forms being about 52 92. So for the 5,000 dollars... I think it would be worth just to have.

BRETT

1:01:21 I probably agree with you there. That said, I need to show you guys that I need to make sure you're okay with it... the diversity.

REID

1:01:32 Annual subscription, I don't...

REID

1:01:33 Okay. No, he's just saying so.

BRETT

1:01:35 Yeah, this is just a pricing calculator. I can't go down to 10 or nine on premium on this. I can for you. So I can just calculate it out. If you guys are thinking about spending the money. If this is up your alley, I'll show you the VRS forms right now before we get into scheduling, our meeting will go a little bit longer, but it's up to you.

--- Forms ---

REID

1:01:52 Yeah. I think that we need to understand what the cat looks like and then see if we need it.

BRETT

1:01:58 Okay. So I'm gonna go back to.

REID

1:02:02 For ours still or are they yours?

BRETT

1:02:06 Ours and they're aligned with pa 25. So code changes we change the.

REID

1:02:12 Do the codes automatically pop up on those ones for deficiencies?

--- Tech On-site ---

BRETT

1:02:19 No, it would still be the same process as far as the quote. Okay. And so, yeah, I got you. So I'm just gonna clock back into this job just for an example. Essentially when the technician clocks into the job from the modify, the technician is gonna, if you have service forms, which is diversity forms, they're going to get this dispatch notification and we got one before.

--- Forms ---

BRETT

1:02:41 I just didn't show you it. So this is what it's gonna look like. They're gonna click on that... and they're going to get their dispatch. And.

REID

1:02:53 I called course, I think.

BRETT

1:02:55 And these forms are essentially made for a mobile device. So it's not gonna look like a form as we're going through it, but the output will look like a physical form.

--- Assets ---

BRETT

1:03:03 So as you can see here, all my information, like my job number, my location, all of its filled out for me. Tim is my contact. I have all the systems that I'm working on. So I'm gonna click on this piece of equipment right here or this asset and I can go through and change anything I need to change.

--- Forms ---

BRETT

1:03:22 And so, I'm sorry, I don't often demo this just looking for the right thing... that's not it... hang on. I'm looking for something else.

BRETT

1:03:38 Let's take this one. Okay? I've demoed, the sprinkler form. So I'm just gonna show you this one. I'll send you guys what our forms are, so you can take a look at them but sprinkler system information, these are my assets. So I have two different assets for this form that I'm working on. I click on the one of them on all the information is filled out. I can go into inspection and essentially mark what I need to mark. It doesn't look like this demo form is set up to be demoed.

--- Forms ends ---

BRETT

1:04:08 And I apologize for that. I don't know what's going on. I don't think I can show you service forms today. I think we might need another meeting. What's that?

REID

1:04:20 How quick can we do that? Let me pull some calendars?

BRETT

1:04:31 Jack?

BRETT

1:04:36 You're busy later today? I can do as early as tomorrow. I could do one PM tomorrow.

REID

1:04:43 Can you do anything earlier?

BRETT

1:04:46 Let me check some of the calendar.

BRETT

1:05:02 I can't do any sooner than one PM tomorrow.

REID

1:05:06 What do you think about the forms of something you wanna look at?

REID

1:05:10 I do, I guess that's my biggest thing that's our problem here. They don't go in and fix efficiencies on their own and whatnot. So, but I don't know if it would be easier just using this program alone to go in and manually do it. They might have the time for that. So I, I'm not.

BRETT

1:05:25 I'm gonna be honest with you from our conversation. It, it definitely sounds like you guys are liking service trade. It sounds like there's a lot of things we can fix. The core program itself is going to save you guys so much time. Some customers join on with service trade and service forms at the beginning.

--- Purchase decision ---

BRETT

1:05:40 Some just start with service trade and kinda learn it as they go. It's definitely more difficult to learn multiple programs at one time. But again, you guys face the

issues. So it's definitely your decision. I'm just kinda giving you whatever?

REID

1:05:53 Is the cost the same? Say we get six months into this?

--- Pricing ---

REID

1:05:56 We say, yeah, let's try integrating these forms. Do I still have the opportunity to buy it for 49, 99 or 49 dollars rather? Or is the price gonna go up? Because I'm not package.

BRETT

1:06:06 No press to be the same and I would recommend buying service trade solo, implementing it. And then three, four months down the road by service forms. That way, you know, how to use service trade and it's not learning two systems.

REID

1:06:17 Okay. So, right now, for service trade only at the premium level would be one 39 per user per month, correct?

BRETT

1:06:25 Correct. You are going to have some setup costs for nine guys. You're going to have 3,500 dollars with a setup that includes your training and getting everything in your account setup.

REID

1:06:37 Okay. How do, how does this get built? Is it monthly yearly quarterly?

BRETT

1:06:44 We Bill annually. Would that be an issue?

REID

1:06:47 No, no. You take overdue invoices. Okay. So first, so for me to get going, I'm doing the 15 one two plus the 3,500 I'm looking for a check to you guys to 18 five one two. And that covers me for the first year plus the 3,500 setup fee.

BRETT

1:07:09 Exactly you.

REID

1:07:12 Go up like the following year is going to be more or do we lock in that?

BRETT

1:07:17 Great question. So I could do, we could do a multi year deal. You guys can log in a pricing up to you. We don't have to do that. We typically do annual that said we had a price increase about eight months ago. I've been at ServiceTrade for four and a half years. That's the only price increase. I've seen also on that written in your guy's contract. If you sign up with us, if we were to do a price increase, we can only increase our lowest price by seven percent year over year until you reach list price that's only if we do a you're paying list price. So, you won't have an increase next year. But if for some reason we were to increase our pricing, which I don't expect because we already increased pricing to deal with inflation.

REID

1:07:54 Seven percent per year until we.

REID

1:07:57 You know, build up started about this, but we communicated and got that down a little bit. Is there any latitude to move here? Is this a fixed cost?

BRETT

1:08:09 What number do build up? Give you?

REID

1:08:11 100 dollars a month per user. They started at one 39, right on the nose. It was the magic number. And I actually chuckled because that's what I saw when I did my research and because, I was gonna stick with joyphil like I told you in the beginning, they didn't offer the forms joyphil's getting me for 40 dollars per user per month. So, they met me in the middle, their platform plus my 40 that I had to carry. Was that one 39 number?

BRETT

1:08:37 Okay. I can't get you to 100. I know that I'll get laughed at, your total cost right now is 18 five one two. Give me a number you're shooting for and I'll try my best, give me a reasonable number you're shooting for.

--- Pricing ends ---

REID

1:08:51 I wasn't prepared for that question that's my job. I know, catch me off guard.

--- Pricing ---

REID

1:09:07 I don't know if you could get me down 20 dollars per user per month, like at 119.

REID

1:09:15 I kind of meeting in the middle halfway.

BRETT

1:09:18 Okay. If I'm able to get you that when you gonna sign?

REID

1:09:28 My first response is I should have started at one nine, not 119 with that offer.

--- Purchase decision ---

BRETT

1:09:32 I don't know if I can get you at, I'll call my boss.

REID

1:09:34 The answer is, you know, where I'm at, you know, where I'm ready to move and what better time to do with them right now? Because, you know, through the summer time, it's generally a little health skelte anywhere with vacations and, you know, customers and all that stuff. So, the answer, is. I'm ready.

BRETT

1:09:53 What I'm gonna call my boss and say Tim, is I'm gonna say, hey, I need here's. What I need here's. Why I need it. You guys are a great fit company. I might struggle getting that big of a discount, but we'll see and I'm gonna say if they signed this week, can we do it?

--- Purchase decision ends ---

BRETT

1:10:07 And that will give you a contract through tomorrow night, 11? 59 PM that will give me a better chance of getting you. It, is that okay with you? Yeah, cool. The last thing I want to go over with you guys before we get started, because this is definitely, if you sign with ServiceTrade, you're gonna go through this.

--- Implementation and ongoing support ---

BRETT

1:10:23 It's onboarding essentially. You guys, you guys tell me you want to move forward, I send you a contract, you sign it, you pay us great. We have the concept of a service delivery window. What that means is that the earliest we can get started implementing your guys account. Now, summer is a busy time for us. The earliest start date I have is I have one spot left as an August for a start date. You guys are going to have a 90 day implementation window that puts you live, what November one? So you can expect to go live November one with your start date being August first. So I can't start, yeah, Monday morning?

REID

1:10:55 Okay.

BRETT

1:10:55 Don't have the bandwidth?

REID

1:10:56 What happens during those 90 days, all the training and all that stuff.

REID

1:11:01 Actually using it?

BRETT

1:11:03 Say, I'll answer your question that, Tim, what do?

REID

1:11:07 None of the technicians are actually using it.

BRETT

1:11:09 During this, so come August first, you get access to your account, they can start using it, but they're not going to be trained yet. So I'm gonna go through this, what I have on my screen with you guys to show you exactly everything, that 90 days entails so sales hand off, you guys sign a contract and we'll get you in the queue. Essentially, I'll assign you a project manager that's who you're going to be working with one on one for those 90 days. You're gonna have weekly calls with them for you guys in the office. The weekly call is going to be about an hour long. Once a week. You guys are going to schedule a kickoff call, two weeks leading up to that 90 days. So somewhere between 715 and eight one, you're gonna schedule your kickoff call. What that's gonna include is schedule a time for your weekly calls, review your timeline. I'm giving you 90 days. But if you want to be live and 60, tell us we can move as fast as you guys can move. They're going to learn more about your business. They're going to get all my notes and they're going to get this recording as well. So they're going to be a little bit ahead of the game, establish measures for success, plan, a time for certifications, for office certifications. I typically set aside two hours per person for technicians. I set aside about an hour per person that's everything. And they're gonna discuss your guys data. It sounds like a lot of data. Enjoy to right now. A lot of its in excel on word documents. So we essentially the data we're gonna need from you guys as your customers in your locations, your services, whether they're one time or recurring. We're gonna need an item and price list. You guys aren't tracking equipment. We're also gonna need your PDF for... learning service trade. So those certifications, their module based courses. There's a test at the end. It's the same exact way I learn service trade essentially the test at the analyst. My project manager know how you guys are tracking. If there's areas you guys are struggling. You're failing on the test, those are areas that we're going to have two and a sessions. You're going to meet face to face like we're meeting right now. Maybe they just need to talk to a person versus doing the module that's how I was, we have the option to add, go live, support it's. Definitely an add on. It's 3,600 dollars for two days companies of your size typically don't do that. If you want it. You can. I don't typically recommend it though. External that gives you two people from my support team come on site to, are Lewis the two days in which you're going live and they're essentially your Google of service trade. Any questions you guys have you say, hey, Adam, how do I do this? Help me train me?

--- Pricing ---

REID

1:13:24 909 100 per guy per day, yep 115 dollars. Now. All right. That's unreasonable.

BRETT

1:13:31 It's not a reason it pays for their flights, their food, their hotels, and their time.

REID

1:13:36 That's yeah... we're out.

BRETT

1:13:40 Of Durham, North Carolina.

REID

1:13:42 Is that where you are? Is that where you're sitting right now?

--- Pricing ends ---

BRETT

1:13:44 I'm in Charlotte, North Carolina. So I'm about two hours east or west... the external systems integration. This is where we're going to hook up your service trade account, your Quickbooks account. We've done that thousands of times before it's essentially, we hook it up, make sure it's working correctly.

--- Implementation and ongoing support ---

BRETT

1:14:01 We pull you guys in and make sure it's working correctly for you guys. And then we set it to go live. The data import review and approval is essentially all that data you guys send us. We wanna make sure it's correct. If there's duplicates. If there's errors, we're gonna send it back. We're gonna say, hey fix row abc. You're gonna fix it. You're gonna send it back. That's gonna continue till the data is correct. We don't want that data going into service trade to start out with last step. You guys are going to go live with service trade. Definitely a time to celebrate you're using the program and it's entire, your technicians are getting information back faster on that. You guys will have ongoing support that includes help center on the website. You can chat us on the website. You can call us. You can email us on premium. You have 24 seven support. You guys will also be given an account manager that's your go to person. You're meeting with me right now. So to get your initial off the ground, your account manager is who works with you as you're using the program. Their goal is to make sure you're using service trade in a healthy manner. You're getting the most value out of service trade, you're seeing the most ROI if it is time to upgrade like service forms. If you wanna add service forms, they're going to be your go to person for adding service forms. And that's really what the onboarding process looks like. Like I said for you guys, it's going to be 90 days in the earliest start that I have one spot left at eight one.

--- Pricing ---

BRETT

1:15:15 The spots after that are 815. So it's on a 15 day interval and there's about seven spots per interval.

BRETT

1:15:30 What questions do you guys have?

REID

1:15:33 No, I mean... yeah. So 1,282, you were able to honor that request 3,500. The chat would be 16 352. Okay?

BRETT

1:15:49 I'll try my best. I have a pretty open afternoon so I'll call my boss right after this. I don't know what he's doing, but I can get someone on the phone. If I get it, I'm gonna send you a contract. Is that all right? Yeah, if I don't get it, I'll call you and I'll explain why... does that eight one start date work for you? Would you rather an 815?

--- Pricing ends ---

REID

1:16:13 Yeah, both her and I are actually out that week and we come back the following. So maybe it is good for 815 because that gives us a week to kinda catch up from what we've been away from and then we get into you the following week.

BRETT

1:16:26 Yeah, that'll work.

--- Pricing ---

REID

1:16:28 Keith is probably healthier at this point.

BRETT

1:16:31 That's fine. I got definitely more spots for those. So we don't risk someone else taking it before you guys sign. So 90 days from may 15, you're looking to go live November fifteenth, trying to get to 119 a user. Let me do that right now and let me see what I can do.

--- Access to information ---

REID

1:16:49 Very good. You have my cell phone. I'm going to be out of the office here. I'm going to look at a job and then I got some other stuff to do. So if you need me, you've got my cell phone number, email will get to me but I don't check it. You know, overly often when I'm on the road...

--- Pricing ---

BRETT

1:17:04 I don't can you that's not, you, can you actually get me your cell phone number? I don't have it right now.

REID

1:17:09 Six zero, three... eight, six, zero, eight, six five five.

BRETT

1:17:18 Gotcha. Cool. Like I said, I will call Jack, my manager right now. I'll see what we can do if I get it cool, expect the contract in your email.

--- Pricing ends ---

BRETT

1:17:28 I'll still give you a call either way to let you know what's going on and let's get you guys kicked off. I'm very glad you gave ServiceTrade a chance because I can see there is so much value here for you. Is there anything else I can additional answer on today's? Meeting?

--- Purchase decision ---

REID

1:17:41 No, as we, you know, we'll probably get off of this and communicate about it a little bit now that it's kinda slow down. There may be a follow up inquiry or two just on process here, but nothing that I don't think is going to fit our needs.

BRETT

1:17:55 Good. Okay. The last thing I haven't gone over here is scheduling, do you wanna see it?

--- Dispatch ---

REID

1:18:01 Yeah, yeah, absolutely.

BRETT

1:18:03 I figured. So what you're looking at right now dispatch board essentially all your techs over here on your left hand side, this is me for example, here's, those jobs

that we worked on today. I completed them. That's why it has that check mark there. This screen specifically is more for your emergency jobs.

--- Tech On-site ---

BRETT

1:18:20 So a call comes in, you hit add a job. JP Morgan is calling me. All JP Morgan's information is here. We can say, hey, they have an emergency. They got leaky pipes. We got to send someone out today. It's 12. Hey, mr customer. I can have someone to you by two 30.

--- Deficiencies ---

BRETT

1:18:38 If I know who that technician is, great, select them, if not leave it blank. The ask that were just like building the service line is the type of work you guys are doing and you guys are going to be a little more descriptive for your technician. I'm just gonna say fix it.

--- Dispatch ---

BRETT

1:18:51 I didn't apply a technician to this. So where it went is this unassigned folder. It's red because it's an emergency from here. You guys can drag and drop to whatever technician you're gonna send. So I'm gonna send Chris kid. Well, one 30. It's an emergency. So that's the emergency scheduling aspect of it. Any questions here?

REID

1:19:09 No, that's pretty neat.

REID

1:19:10 Would you do the same thing for a service call that's not an emergency, but someone calls. They have any light that needs to be swapped out, you can.

BRETT

1:19:16 Yeah, I, probably, this is really, any service calls that are not recurring. You'd probably do it from the screen and you can also do available jobs. So, hey, we got a bunch of inspections or installs or service calls to do. This is all work that we just need to schedule. And it's exactly that. It's just drag and drop. So, I'm just making my technicians.

REID

1:19:33 Like inspections, everything.

BRETT

1:19:36 It, it does work for inspections. I think I have something better for inspections that make sure nothing slips through the cracks.

--- *Recurring maintenance* ---

REID

1:19:41 So, and...

BRETT

1:19:44 I'll show you that right now. It's this right here called service opportunities. It's a report that you guys run to make sure that nothing does fall through the cracks. So let me look at next month in my alarm division and let's look for recurring services. So this pings all your locations in your service trade account, looks for everything that's do you guys would hit select all because you have to get all this work done next month? I'm just gonna select a few of them and I'm gonna grab this route one specifically because it has two icons. And I'll show you on a second. I know these are recurring services. So I'm searching inspection if I have preferred technicians, great, put their names here if not leave them blank.

--- *Dispatch* ---

BRETT

1:20:16 You can figure it out later when we schedule. But remember that route one, let's go, look at it. There's two different icons. There's meaning there's two different services. They're both do within the same time frame. So ServiceTrade is gonna automatically schedule both of them on the same ticket. Unless you guys check otherwise. If you don't want the tech to do both these inspections at once on select it. The reason we do it is to reduce the amount of truck roles to location.

REID

1:20:41 Got it. Okay.

BRETT

1:20:42 So from there, you create six jobs and where they fall is onto our map based scheduler. Let me filter this and okay, we're right here in Raleigh. So service trace based right up here in Durham, you have all these gray pins. Gray pins are telling me that jobs are both unassigned and unscheduled and that's exactly what we're here to do today. All of your technicians have pins, colored pins that's how, you know, who's going where, but we're here to schedule all those gray pins. So I'm gonna take an man, I Boston, we're gonna drag and drop her to these jobs. So I've got all these jobs within this little area here. It doesn't make sense to send and then send an is already there. So let's geographically schedule Anna in a way that makes the most sense. She's only driving a total of four Miles here. I scheduled Anna for all these jobs. My last step is I'm gonna drag and drop these down to the calendar. You can see that all of these pins gain calendars in them. Meaning all of these have appointments. You can click on it and see, hey, the appointment is seven seven eight am. I suppose to take a quarter of an hour. So this one's a little bit better for scheduling the inspection side. I'm not gonna tell you how to do it. If you wanna use the dispatch board, use

the dispatch board. That's just what I heard from our customers because it does say, hey, Anna is in this area.

--- Dispatch ends ---

BRETT

1:21:50 I'm gonna send Anna to these four. I'm gonna send Brett to these three. I'm gonna send him to these three. So your tech isn't driving all across the city?

REID

1:21:58 So we have 90 Burger kings that we deal with from, you know, south of Boston, an hour and a half north.

--- Dispatch ---

REID

1:22:06 Could we put those locations to figure out what works? And then, use that map as a way of scheduling the right people? Awesome, absolutely because I'm going into Google maps, making the pins first to figure out where they are and then figuring out how to do it takes me about an hour, schedule seven locations.

BRETT

1:22:22 That's painful. What you'll do is Tim, you'll run that service opportunities report for Burger king? It'll throw all these pins on the map right here. I see all you can see where all those locations are.

REID

1:22:32 Well...

BRETT

1:22:33 You just figure out, I'm sending Tim here, Beth here right here.

REID

1:22:37 Love it. Now. Is this associated with the dispatch board you were talking about? Like...

BRETT

1:22:42 There, there are two different functions. But if I make an adjustment on my map is scheduler here, it will reflect on my dispatch board.

REID

1:22:49 Or anything. Even if they're going to an inspection, it will go onto this past board of where are going that's correct? Okay. So, obviously, if somebody's got an inspection over wherever and we have a service call wherever it won't you know, it'll show that person's busy basically and we can't just pull them off.

BRETT

1:23:08 Exactly. And if you do double book, you'll get this orange glow right here and say there's multiple jobs scheduled here. I completed both jobs so I can't move them. So if I take like these two, you got that overlap rats overbooked let's fix that?

REID

1:23:22 Okay. We'll...

REID

1:23:23 Drag it to somebody else's. Calling Billy right above Bill.

BRETT

1:23:27 Exactly.

REID

1:23:28 Got it.

REID

1:23:28 What do you do for vacation? Don't schedule anything? Or can you put a vacation block in there? That way? We know that he's not available.

--- Dispatch ends ---

BRETT

1:23:37 I would, what our customers do, it is a little bit of work ground, but they'll make a job for a week and they'll save vacation and it'll just say vacation or?

REID

1:23:44 Rectokay, so there is a way around it to not make a mistake.

BRETT

1:23:47 Exactly.

REID

1:23:49 Perfect. Okay. Is there a, is there a maximum this will work for? Is, is growth potential to 300 employees?

BRETT

1:23:58 As big as you want, our largest customer is about 600 technicians.

REID

1:24:01 And they're using something like as well.

BRETT

1:24:06 Marmic, marmic, might be the biggest on core, probably near you guys. Yeah.

REID

1:24:14 Both of them. Okay. Well, that's great. Speak to your boss. I'm gonna get on the road and any follow up information, whatever my cell phones on?

BRETT

1:24:23 Yeah, sounds good. Tim. Best appreciate your time as well. I will be in touch. Give me about an hour to put everything together.

REID

1:24:29 Thank you.

REID

1:24:30 Thank...

BRETT

1:24:30 You guys take care.

The End