



# ServiceTrade Demo with JAS Industries, LLC

Aaron Ward with JAS Industries, LLC  
Recorded on 6/9/22 via Zoom, 51 min.

## Participants

### **SERVICE TRADE**

Aaron Ward  
*Territory Manager*

### **JAS INDUSTRIES, LLC**

Joyce Blouin  
*Finance*

### **OTHER**

16036695159

# Topics

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# Transcript

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

*--- Call Setup ---*

AARON

0:00 Should be a mute, none, mute button next to the stop and start video buttons. There's also a chat box if you need to chat with me that way.

AARON

0:31 Hello? Hello? Hey, alright. So you dialed in, I guess, does your company didn't have in my?

16036695159

0:39 No, it doesn't...

AARON

0:41 Gotcha. Okay. Well, hey, thanks for meeting with me. Can you see my screen? Yeah. Okay, perfect. Awesome. Can you see me? Okay, awesome. So, hey, I blocked off an hour till noon for us to talk.

*--- Call Setup ends ---*

AARON

0:59 You know, the purpose of this is just see if service trade is going to be a good fit for the company. I suspect that it would be, but we'll go through it and see if it's not, you know, I'll tell you this isn't a good fit or if you tell me totally fine. But the plan was basically, you know, agenda wise, wanted to kind of get some more information about you, all the bottlenecks there, and then some sure share information about us, the dive into the software, show it to you, do a mock job service trade. So you can see what that's like. And at the end, if it makes sense, it's a good fit, we can kinda plot out next steps for forming a partnership. Does that work for you?

16036695159

1:35 Yep. Okay. Cool. That sounds good.

AARON

1:38 So, you know, I know when we talked obviously, you know, FieldEdge, you said you all, we're doing like 90 97 percent commercial basically.

16036695159

1:47 Yeah.

AARON

1:47 And it's a H vac, ventilation, refrigeration AC preventative maintenance work. Yes. What's kind of the bulk there is H back?

16036695159

1:59 Hey, this would only be for the service department?

AARON

2:02 Right. Okay.

16036695159

2:04 So, it would have nothing to do with our install.

AARON

2:06 Got ya in the service departments, doing mostly HPC work.

16036695159

2:11 Yeah, service work and ran into maintenance stuff like that.

AARON

2:18 And what accounting system do you all have?

16036695159

2:21 Hi.

AARON

2:22 What accounting system do you all use?

16036695159

2:24 Quickbooks?

AARON

2:26 Okay. And so FieldEdge, I know you said set more problems that you can even really tell it sitting maybe on the phone just more than you can.

16036695159

2:37 Yeah.

AARON

2:39 We got into a couple of those, but would you mind like reiterating, you know, how it's terrible, exactly. I know the tax, I think you said tax jurisdiction was kind of an issue.

16036695159

2:52 Absolutely, because we're New Hampshire non taxed, but we also do work in Massachusetts where you only tax items you can physically touch. So that became a big issue and also that you can't pull really good, find it, you know, accounting reports. Sometimes you need to know, you need to make sure that you receivables are matching I'm in the software in FieldEdge, Jas and Quickbooks, and you also need to make sure all invoices actually went over and that's not such a great you, it's so hard to pull reports from there. So we're just, it's just been a struggle.

AARON

3:34 Gotcha. And are you your official title there? Is it office manager?

16036695159

3:40 Financial manager?

AARON

3:41 Financial manager? Okay. And what about for, you know, the actual, the application of it in the field? I mean, is it or the text using it good? Or are there any kind of problems there?

16036695159

3:56 The time sheets don't work. So we have to go in and adjust hours aren't when we do billing... to make sure all ours are accurately being built to the proper customer.

AARON

4:12 Got you. Okay.

AARON

4:17 Have you been, does it work okay, though pretty successfully? Like no outages or?

16036695159

4:23 No, no. We've had none of that.

AARON

4:27 So, it looks like you're just, it's mainly for the kind of reporting side of things. If you could find something better, would you want to move to something different? Maybe this year? If we could show that to you? Yep. Okay. Did you have like a timeline perhaps of how fast you would want to switch over to something if you?

16036695159

4:43 Have a time line? No, no... no. We're not rushing into anything. We're going to do the, trying to make the right decision?

AARON

4:52 Sure. Sure. I know I kinda called you out of the blue, but is it something that you are actively looking for? Is this?

16036695159

4:59 Darn it. Yeah, yeah, we're kind of looking.

AARON

5:02 Okay. What other ones have you looked at other than service trade even though I haven't shown it to yet, but you know what I mean?

16036695159

5:09 We've looked at a few others. I mean, I can't remember the name BuildOps and so probably just different ones. I can't remember all the names of them right now. Sorry about that.

AARON

5:19 No, no problem. Okay. And I guess for making the decision, are you kind of the lead on this or is it kind of a group decision with several different executives? Gotcha. So what a second demo probably be an order down the line?

16036695159

5:34 Well, let's go one step at a time.

AARON

5:36 Sure. Okay. Well... let's go through kind of a demo of it. So you can see if it's a good fit for the guys, you know, based on the kind of company you are. I'll tell you a little bit about us real fast. So, you know, we are specifically made for commercial service contractors. So we work with companies with three tax and we work with companies with like 300 text. So kind of a wide variety. These are some current customers on the screen of ours in the northeast. So the past couple of years of course has have been actually, you know, large growth years for the industry. You'll see MVP the blue line. So we are made specifically for commercial. So we're big in the mechanical, electrical, plumbing space and also in the fire life safety industry. Well, there is some crossover between the industry with some companies. So both industries though have actually experience a lot of growth over the past few years.

--- Pricing ---

AARON

6:36 The pay debit years. They've grown about 50 percent. So that's just to say, you know, growth is the standard. If you want to keep up that's you know, how we've position yourself basically is a growth platform, help you all grow. How we do that. So this is our mission statement, help versus search contractors become more valuable to their customers and grow their business. We do that. We help on that front. Maybe three primary ways. The first is operational efficiency. We want to, you know, empower your staff to be able to get more work done with the resources, the number of text and trucks you have on the road currently, and also organizing all of your customer data into a centralized location. So anyone who needs that can access it from wherever they are the world. Secondly, we want to enhance all your communication that you have with your customers by taking that communication online to give a robust customer experience. So really focused on not just being like a customer management platform. We're also a customer engagement tool. Similarly, I would say an analogy for that would be anytime you shop on Amazon, you know, you don't really ever talk to a human being, but you're getting a ton of email communication from the company during your buying experience, specifically service straight with setup to provide that kind of that same level of customer service. And third are deficiency quoting feature. We make it really easy for the technicians to report deficiencies as they find them in for you to be able do in the office rapidly for those two quotes. So we did a data study where we looked at the top performing are fastest growing companies in yeah industry. The fastest growing companies like to focus on metrics like maximize revenue per customer and revenue per work order, the ones that we're focusing on that we're growing the fastest, compare to the bottom half. It, a lot of that was maximizing the amount of pull through work that they were getting from their customers.

--- Pricing ends ---

AARON

8:31 So, you know, in that data study, we basically found that the ones that were growing the fastest we're able too... they reported repair opportunities on one fourth of their work orders and they converted about 50 percent of those into quote approvals. So increasing revenue with your existing customer base already. Basically the deficiency quoting future makes it really easy for you to do that. So that's probably the three ways we help. So. Okay. Any questions right now? No. Okay. I'll jump into the.

16036695159

9:04 Okay. Okay.

AARON

9:07 So, you know, this is the service dashboard. Basically, this is, you know, what you're gonna see as soon as you log in. So for, you know, the office staff to be able to keep track of everything that's going on kind of in real time. This makes it really easy. So the first thing first you'll see is the daily schedule... your technicians, where they're going to be in, when in each one of these are going to be basically job pages. You could open up... below that, all of your preventative maintenance or any kind of plan maintenance or recurring work that's not a, you know, recurring basis. It's going to be in service trade. It's gonna alert you when it's upcoming. So like these are jobs without appointments that are doing the next two weeks. So you're basically alerted you need to create the jobs and schedule these out for these recurring work. If it becomes overdo, it ends up in this category right here. So if you have like an

annual PM that's doing maintenance gets to June first, it's gonna end up in this category. So you're alerted, you don't want that to slip between the cracks, right? Once the jobs are completed by the technician. Do you have this running category right here, past jobs to be more complete? So you want to look at these job jobs in service trade to make sure that the time and material is correct before you bill it out. So you have a running list of that. Once you hit complete on that and create an invoice, it ends up in the next category completed jobs to be invoiced. So you have a running list here. Hey, we need to invoice these out. Definitely don't want to say, forget to save voices. On the right hand side. You'll see technicians clock events. So anytime a technician clocks in or out of service trade, there's a GPS snapshot that happens... of where they were when they clocked in and clocked out of the mobile app. You can open up this map and kind of zoom in and see the pins directly on the map to see where they were.

16036695159

11:05 Give it, let's see, okay, yep.

AARON

11:08 How do you think this, you know, sort of thing would help the office staff manage the day to day there?

16036695159

11:15 I'm in the office. Mostly we have that it's a dispatcher and invoicing. So, you know, it looks way different than what I've seen anywhere else. Yeah, it does.

AARON

11:31 I've never taken a look at.

16036695159

11:33 Board is not even just feel that any system I assume that's your dispatch board?

AARON

11:40 No, this isn't the dispatch. We have a dispatch. Well, dash, yeah, just the service.

16036695159

11:45 I was like, okay, yeah, that's cool. That's good because that's you know, making sure nothing slipped through the cracks is important.

AARON

11:54 Yeah, exactly. So, yeah, just on page one, you don't have to read reports. Like you said earlier, running reports is kinda difficult FieldEdge. So you don't have to run any kind of report to get all this information on what's going on at the company day to day, just right here.

16036695159



12:12 Okay.

AARON

12:15 So, all the customer data is... you know, all the customer data set up by company pages, so we can run over to a particular location, yes, sir.

16036695159

12:29 If I have a company that has 100 locations, I can go to that main company and see all their locations.

AARON

12:36 Exactly. So I'll do that right now. So this is a 24 hour fitness just as an example. It's the company page with the billing address. And then if we click down here under locations, we'll see that for locations we service. So you would have 100 different ones here. Basically, if you service 100 different locations for this company, each one with the ship to address, so I can open up, you know, each one of these and see specific information about that one location might be different than our locations. So I'll open up the east north port in New York. So two of our effort as east north for New York, we'll see... address at the top underneath that. Any services that we do here. So these, all these are the services that we do or have agreed to do here. So like this is a quarterly HP AC job PM, that's do every three months, it's overdue. It was doing mate. So we need to schedule that out. It's gonna show up on the dashboard of course, that's overdue. But these are rolling o'clock centrally. So like for this example, this is every six months, we do the semi annual job. The next time it's due in September. So as soon as the job is created and completed, this will automatically update to the next do period.

16036695159

14:02 Right. Okay.

AARON

14:04 So, you don't have to worry about, you know, it will just do that in perpetuity, and you can set these up basically on any schedule you want. So here's an annual, you know, semi annual, you can do monthly kind of whatever you need to do for all of your recurring work. And it's just going to be in the system for this is the service we do at this company, this location, below that. If you need to see previous jobs, you'll see the entire list. You can also, you know, search for jobs under the jobs area.

16036695159

14:33 Right.

AARON

14:34 Right. Exactly. And we track all the equipment service trade. They're under the assets list. So, you know, for your, so your tax have all this information when they're out in the site basically like this is a Greco calling tower here's. A boiler unit. Each one of these will, if we open these up, we'll see jobs that have been done on that piece of equipment specifically or the jobs are going to be tied to specific equipment. Any

problems or deficiencies that have been found on that piece of equipment, you know, kind of anything, pictures or videos that were taken by your tax. So, your tax, when they go to a site, even if they've never been there before, they can just open up this history, have a Rich history of that particular piece of equipment. They're about to work on... y'all, track equipment like that in the field, it?

16036695159

15:30 Yeah, it can track equipment. Not quite like that. I don't do that aspect of it, correct? Does that aspect? I do financial idea. I'm worried more about making sure everything gets built out or he can send me everything... from my point of view, from the finance point of view. It's FieldEdge just doesn't work. It doesn't have the reports to watch the receivables to make sure things are being invoices are being applied correctly. You know, that's what I worry about. But Chris handles all that, the other stuff.

AARON

16:04 Gotcha. Chris, is that you said the service manager?

16036695159

16:06 He's a dispatcher and assistant service manager. Yeah... I'm going to send him when I get the recording, he's going to review it.

AARON

16:16 Okay. Got you. Because I definitely could do one of these with him. And maybe, you know, dive in more into some of these aspects that maybe you don't deal with that much if that would help?

16036695159

16:28 Yeah. Let's like I said, we're going to do one step at a time.

AARON

16:31 Yeah, I got you. So I'll just kind of run through just list just a little faster. But since you don't really deal, you know, deficiencies, you know, problems. I've been found, any quotes or proposals they've been sent out, you know, comments can be added for location. So your text always have specific information. You can add attachments like PDF or pictures like manual, you know, critical manuals, something like that. So you don't have to give them to your tax anymore. So I'll create a service job for this specific location and then it will automatically populate with all the information from that location service. So at the top, you'll see the billing and the shipping address is differentiated right here at the top. Contacts have been pulled over to your text. Have the information below that you'll see, you know, this is scheduled for today, the job that we're doing. And then all the parts that are used for this job, this comes over from that service template that I showed you a second ago with the prices. It can be edited though if you need to add other parts et cetera. But it's going to be right on the.

16036695159

17:39 Quick question. This is gonna sound like a weird question, but say an invoice is finalized, we've done the job. It's finalized. We send it to the customer and this is just something that happened and the customer comes back and they complain and we say, okay, we're just gonna give him. We're gonna knock a couple of hours labor off. Are you able to go in and credit that invoice?

AARON

17:59 Yeah, you can add, you can add a manual credit.

16036695159

18:03 Perfect.

AARON

18:04 You'll have to what I think you have to do is re open the job and then edit the invoice and then add that credit in a resend it?

16036695159

18:13 Right. Well, we just don't we don't necessarily want to change like the credit is kind of written off on the financial part. So we don't necessarily want to change history, see because they might not call us for a month after we sent it April thirtieth, they don't call us, tell me fifteenth and say, hey, this isn't right? So we're going into the following month which is already been closed. So we just need to credit that invoice without reopening it and changing the original due amount. Whereas going in and giving them a credit.

AARON

18:46 Just to be honest, I'm not sure you can add a credit without reopening the invoice. I know you can add a credit. Perfect. Yeah, but.

16036695159

18:54 Hello, change history in the accounting world, right? You know that. So, no, I appreciate your honesty that's perfect. Don't I'd rather have that answer then, you know, that's true.

AARON

19:11 I mean, there might be a way to do that. You know, I just don't know if you definitely can. I don't want to tell you that, you know, something that's not right? But I'll ask around to see if there's a way to add that credit in, but I'm not sure.

16036695159

19:26 Yep. Excellent. Perfect.

AARON

19:28 So, just to, you know, show you the mobile app. I'll show you this job page here. From the mobile view, this is the mobile app. This is what your text would see for

that job. So you'll see, you know, we measure time in three ways so you can measure job preparation. If they're gathering materials or something, they can clock in for that. When they're in route, let's say they're leaving your office and going and route, they can clock in for that, there's or the time that way notify the customer, they're in route... with an estimated time of arrival. So, you're customers should have an idea of when the tech should show up there. When they get on site, clock in... if they need a directions, they could hit the directions button here, pull up maps. There's the address though right there. Once they get on signing clock in, they'll probably come to services and see, you know, whatever their marching orders are for the day, this is the service that we're doing. They come to assets and we'll open up any of the job history. So... you know, they could come here. This is the equipment we're working on today. We can open this up and open any previous job pages.

16036695159

20:40 Fine. Can you hold on a minute, please?

AARON

20:43 Yes.

16036695159

20:44 Thank you.

16036695159

20:51 Whether.

16036695159

20:51 Home or at work, our comfort is reliant on the air around us, not the cost, not too cold. Not very, that's why AI make sure it's just right and has done since 1990. Good. Your heating, cooling, refrigeration and ventilation, special offerings, economical solution to your Construction and service me. So, how can we help? Let us know? And just a moment AI?

16036695159

21:14 Hi, sorry about that. Aaron.

AARON

21:16 And no problem. So, yeah, they, they'll be able to look at the history of this piece of equipment, even attachments like photos or videos, that previous text I've taken where they can add them in themselves.

16036695159

21:31 That's cool.

AARON

21:32 So, they'll have all the information right there at their fingertips. Now, when they're coming through and doing their job, perhaps they find a deficiency. So we'll come here to deficiencies, see the previous deficiencies that have been found. And we'll go ahead log one. So they're finding on this PM job, let's say broken compressor. So we'll just log that will say they want to take some photos of the problem so that when you send a quote out, you can have photos on that quote. So your customers know how serious this is. I am, yeah, they could use a phone. You can use any kind of.

16036695159

22:14 We've gotten them all Tam, they have iphones and they have tablets.

AARON

22:19 Perfect. That should work just fine. Okay. Well recorded audio memo. So the technician can communicate with whoever sends the quotes out. You know, exactly what the problem that solution is without having to spend time typing that up. Let's say they needed to, will log that as an operable, and we'll tie it to a piece of equipment so that we're building the Rich history will say this is a new one that hasn't been found and we'll just, we'll log it. So it's logged. So as soon as this logged, whoever does the quotes, is that Chris, that does the court?

16036695159

22:55 Yeah, exactly.

AARON

22:57 So, they would get an email notification that a deficiency was found by your text, they would want to go in and look at it. So.

16036695159

23:06 Well.

AARON

23:06 So that they can send a quote out will come open up that deficiency from that email. See broken compressor was found, see the photos that were added. And then we'll go ahead and create a quote for this deficiency. So this has potential pull through work. We want to send this out as soon as possible for our customers to capture that money. Okay? So we'll apply here's where we would create an edit a quote. We can apply quote templates to save time. If you have set up templates in advance for things that you find regularly. So the parts of the items that would be used for that repair opportunities, go go ahead and add that in with all the verbiage that you would put on a quote. You can edit all this info out. If you need to. No problem. You can also edit the parts however you need to as well if you need to do adjust this and then choose the amount of detail you want on the quote. Since you're on the phone, do you ever deal with quotes since you're on the finance side or is that more of a Chris Dave thing? Okay. Yeah. Well, I was just gonna show you. I'm gonna send this.

16036695159

24:15 Hello?

AARON

24:15 Just so you can see, yeah, yeah... I'll leave the photo on because the frozen photos worth a 1,000 words or 1,000 dollars in this case. And also... okay. Yeah. So if you check your email there should have gotten the in route notification already.

16036695159

24:37 Yeah... I got the quote. Yeah, yup. Got both of them.

AARON

24:43 So if you wouldn't mind opening up the quote and then approving it, you just hit view and respond to quote.

16036695159

24:58 Okay.

16036695159

25:06 Okay.

AARON

25:07 Yeah, perfect. So you can see here, you view the quote... on my page, you'll see the time line and then you approve the quote. Pretty easy. Yeah. So just like that, your tack log that pull through work, you rapidly create a quote. You send it out. How do you, how do you feel about how that quote looks?

16036695159

25:29 That's fine. Alex. Good.

AARON

25:32 How does this compare to the quotes you sent out currently?

16036695159

25:37 We have different quoting system. So, I mean, it looks good. It looks easy. I don't know what does that?

AARON

25:47 I gotcha. Do you what's the system you do the quotes in currently?

16036695159

25:53 FieldEdge?

AARON

25:55 Okay. Gotcha. So yeah, doing it this way you saw how fast that was that's going to be something somewhat unique to us. Is that quote loop? Making it that easy and being able to track them? So you can see the time line on this one. But you can also kind of do a quote report under our equipment, you to track all these quotes, zal, outstanding money that you want to capture, correct? So we could run this run a report here for every quote that's been submitted but not viewed yet or submitted into you'd. Run that report where you can also do it by specific customers. If you just want to see those quotes or, you know, other kinds of criteria, no problem. But you can then all these that popped up. We'll just go ahead and mass resend things to our customer, just push them right back to their inbox, you know, how things get lost in boxes, but you'll also be able to add a comment or it's just giving you clear visibility. You can also do it's submitted and viewed but not approved for those customers. Do the same thing. Give them a call if you must. But you want to clear visibility on all this. So you can track this, these quotes because this is all outstanding money. You know, if they just kinda forgot about the quote, we got lost in their inbox, you might not be able to check on the quote if you don't have visibility on it until maybe the next Pam job which could be six months or a year from now or, you know, having to manually check on quotes can be very tedious. So this gives you just clear visibility and all this money. So, you know, we make it really easy for the text to log more deficiencies as they're finding them. And we make it really fast turnaround time for you in the office to send out these quotes. We have a lot of customers that sell the preventative maintenance jobs like little cheaper to be more competitive, but mostly so they can capture all this additional revenue. So we did a data study in the industry. We found that companies that were growing the fastest. We're the ones that were utilizing this the best, basically the maximizing the pull through work. So.

16036695159

28:04 Yeah, exactly. We're very busy. We are very busy. And then one of the biggest problems is actually trying to find help.

AARON

28:16 And that's why, you know, operational efficiencies key, and also, you know, having a really robust scheduling system so that you should be able to get more work. Like if you could get your guys to one more job per week with a better scheduling system, how, you know, multiply that times, you know, the number of tax and the number of weeks of the year, how much more revenue? Is that right? Because we all know that the, it's a global phenomenon. Pretty much. It doesn't matter if I talked to companies Canada or the US or any part of the US. There's a text shortage everywhere. So.

16036695159

28:54 Yeah.

AARON

28:55 Gonna be alleviated anytime soon. So the best you can focus on streamlining the service department as best as you can.

16036695159

29:04 Yeah, exactly.

AARON

29:07 So, from here, you know, we can create a new job from this quote or we can add it to that existing job right here on the quote page, either one.

16036695159

29:16 Okay. So.

AARON

29:17 We'll jump back out to the field here. Your tech log that it's been approved for your tack. If he's going through the job and... he needs to come to the job items, maybe he used something that he wasn't expecting. We'll go ahead and just select that item. It just add that in so that you're making sure. So he's two two widgets, you pull those off the truck. We're gonna add those in that's taken care of so that your invoicing for those they're not going on accounted. For. Do you all do any job paperwork out in the field? Like checklists? Pam, checklists, things?

16036695159

30:00 Yeah. Yeah. Some customers actually requiring.

AARON

30:05 Right. So we can have those uploaded as fill ubl PDF for you. This is optional, but you can just, I'll choose, you know, your tack would just choose the appropriate?

16036695159

30:14 Hello?

16036695159

30:15 Dawn, again, one minute, please? Sorry, hold on.

16036695159

30:23 Whether it homework.

16036695159

30:24 Or our comfort is reliant on the air around us, not the cost, not too cold, dirty that's why AI make sure it's just right, and it's done since 1990, good. Your heating, cooling, refrigeration and ventilation, special offerings, economical solution is to your Construction and service me. So how can we help? Let us know. And just a moment AI dominating are craft.

16036695159

30:52 Not only will we design your full H facts system especially crafted around your specific space and neat, but will install it to making us the full service providers never skips on quality support. In fact, that's what insurance are exceptional build



quality every time your design build expert, just see for yourself through our recent projects page and accurate, Aaron dotcom?

16036695159

31:18 AI is proud to be one of the leading provider of residential commercial and industrial H vac services in Manchester. New Hampshire. We're here to help Monday through Thursday from seven 30 AM to four 30 PM and Fridays from seven 30 AM to four PM. So just let us know what we can do for you today.

16036695159

31:40 Did you know 75 percent of all the parents can be avoided with the right prevention? Let's make sure you're on the right set of those stats with the maintenance program at the text, isolate and correct any potential problems in your H back system before they call it bigger issues and bigger Bill, find out more accurate. Aaron dotcom?

16036695159

32:02 As a family owned business, focuses on service timecard, that goes above and beyond. And some of our amazing team has worked in the industry since the seventies. But whether they have 10 or 50 years under their belt, all our technicians are factory trained and ready to provide a very fine as support goes to the test. And just a moment.

16036695159

32:25 Hey, hi, is proud to have certain thousands of satisfied industrial commercial and residential customers over the years, trusted us for the finance, preventative maintenance and installations in the Manchester Mary. Today. We're ready to put that expertise to work for you. Tell us how we can do that when you're connecting.

16036695159

32:53 Whether it at home or at work, our comfort is reliant on the air around us. Nothing costs. Not too cold. Not very. That's why AI make sure it's just right?

16036695159

33:02 Hi, Jason on the honest, why it came in?

AARON

33:05 I got you. Okay. But here's the form basically. So if you had like a form like this is a refrigerant tracking form. Just as an example, they can just fill this out on their mobile device. Will we can just turn these into syllable PDF. You'll see they loaded it. The tech loaded. It becomes partially filled out automatically with some information. They would just come through, you know, fill this out and save it to the service trade account. It will show up as paperwork right here. So we'll just say, you know, the scenario your tech log the deficiency or pull through work. He added the job items. He filled out that paperwork. Oops, excuse me. He's done with his PM job. He probably took some photos in the field, et cetera, will create a work acknowledgement that this job was done. So we can select a signature or sorry, get a

signature. So we'll just select the contact on site and then we'll re, and so your customer will see this and they'll say I acknowledge the work is done and we'll get a signature and then that you'll have that in your documents. So you can choose to, you know, send a copy of the work acknowledgement to them if you want to. But after that, you're done, your tech would clock out. He's gonna say he's finished with this job if this was a, you know, like a multi day job like at retrofit or install, or perhaps... you know, he had to go the store or, you know, he just had to come back the next day and click. No clock right back in no problem. The job and service trade is always keeping track of the time on each visit. So we'll say he's done though with this job. So that's completed. So if we come back on the dashboard, you'll see this is where we are. Now. The job has moved from scheduled to pass jobs to be more complete. So we just want to look at the job and look at the time and material. So we'll say let's see it says completed. But up here, it says in Progress still. So we'll come look at the items. I have this group by service. So if you had let's say multiple services on one job, you could have them grouped in each service. We only had one service on this job. So these are the ones that came with automatically in here are the two widgets that the technician added from the field. We can edit this and add other items here if we need to, no problem. But I'm gonna say that we're done here. So we'll just complete this job and create an invoice. Or you have a step here. If you want to still have the option to add other job items... and then we'll edit this out before we send it to the customer. You can, you know, not taxable that's fine or you can manually input the tax rate, or we have a like a module in internally inside service trade that will tell you what the jurisdiction is for that particular jurisdiction.

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AARON

36:16 So just stay not taxable, choose the amount of detail, just like on the quote, I can choose how much detail I want on the quote. So all I did grand total last time. So I'm just gonna, you know... line item with grants will only. And we'll see the... gross margin here at the bottom... right? We'll go and save that... and we'll send the invoice. So similar to the quote, we make it really easy for them to pay with that big green money button in the upper right.

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36:56 We, we actually get paid probably 99 percent by check, which for us is not a problem. I know you think, my God, it so outdated but we pay no fee and I deposit checks right here at my desk. I have a machine and I just scan the check from deposit them. We see thousands upon thousands of dollars a year... on credit card fees. We like we pop, I can't even tell you how much money we save on credit card fees, huge money. Yeah. Well, because we're commercial. So, you know, mostly commercial. So people's then didn't jacks.

AARON

37:37 Let's just say they can pay with checking right on the invoice just to have a, you know, decrease the turnaround time for you are getting paid your terms and conditions, of course, or at the bottom here. So that would be your company's terms and conditions. So, I guess, are you saying they physically mail the check soon?

16036695159

37:56 They do, and what we have found that do AC H, we have some that do AC H, but the majority actually mailing Jack.

AARON

38:04 Well...

16036695159

38:04 Yeah. Okay. Bye.

AARON

38:06 They can still do that.

16036695159

38:08 Yep, right. No, I'm just saying we and a lot of companies now because I tried to pay with amex as much as possible from the company. But a lot of companies now are charging a fee. If you want to use credit card. We're finding that... they will charge you more if you want to use, you know, they will charge you a percentage of whatever you're charging. If you want to put it on a credit card. Fees are just getting an astronomical. Okay. I'm sure, you know... that's an interesting fact.

AARON

38:42 Yeah. Well, if you send the, I was gonna say if you send this invoice out also, it comes with this job summary. It's called service link. The service link can be sent separately. It could be sent before the invoice as well, but it's just a job summary report. Basically, this is what happened. This is what we did. So they're not just getting a Bill in the mail.

16036695159

39:04 Right.

AARON

39:05 Anything you choose to share, maybe you want to share before and after photos, maybe you want to share, you know, specific forms they want you to fill out something like that on here's. The form for the work acknowledgement, where you had your tack get their signature before he left the site. Yeah, there it is right there. So they're again, they're just getting this explanation with the invoice. So they shouldn't be getting any. You should be getting angry phone calls... for bills. They don't understand where, you know, that came from et cetera. So you can send it out that way for running the report. We can come to the invoice report... for this invoice. We can run this report in a number of different criteria. So if we want to look for, you know, fully paid, partially paid, who has not paid yet? It's been sent or maybe I need to send it either one... then run that report... you know, by different kinds of criteria here, you can do it by dates, etcetera.

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AARON

40:15 Yeah, you can run that report. And then as you're receiving these update the status at one time to paid. So you don't have to do it more than once. And you can also mass submit them to the accounting system because we have a integration with Quickbooks. So once the, you send the invoice out, whatever the status is, you know, you'll push it over to Quickbooks, right? You said Quickbooks, did you say desktop or online... gotcha? And that's on a PC? Yep. Yeah. Yep. So if you, we go back to the invoice screen itself where we created it also, you could just send it directly to the accounting system right here. And that's it if you wanted on this screen also to add a payment, you could.

16036695159

41:07 Okay. So.

AARON

41:08 You would add that and then add in, you know?

16036695159

41:12 Yep. Perfect. Now, I have the payment and Quickbooks, does it update it in and the software?

AARON

41:19 And it's a one way integration from Quickbooks, sorry, from service trade to Quickbooks. So my recommendation would be, you know, you're managing everything and service trade and then pushing that over to the general ledger? So, okay.

AARON

41:40 I think that was kind of everything that you had asked about because I know when we first talked... you know, non tech states. You said, did you say a server or a FieldEdge was automatically adding tax to the jurisdictions that were non taxable?

16036695159

41:57 No, it was it? No, it's just, you have to update everything to say non taxable. It just a pain like in here which is mostly non taxable. So, it would make you update every item on an invoice to say, non taxable, non-taxable even though we've listed the customer as non taxable. It doesn't it just, it's wanting huge. You just have to go in and change every part, every item to say, non taxable, non-taxable non taxable. It doesn't overall say this is a non taxable customer where, you know, like I said, New Hampshire just doesn't have tax.

AARON

42:39 Well, can you see this being a better fit for you? Will?

16036695159

42:43 It looks pretty good. Yeah, I'm going to review this demonstration because you'll send it to me, correct? Yeah, because I'd like to review it, but it looks pretty good.

AARON

42:57 I think, you know, we can handle the workflow, probably better than FieldEdge in terms of, you know, streamlining the service department. If you have any other questions about?

16036695159

43:11 Show me, can I go in there and pull a report to see what has not been billed... but nothing, you know, finalized and build the invoice?

AARON

43:23 So, you on the dispatch board, you know, first, right? On the, not the dispatch board, I'm sorry, on the first page dashboard, you'll have this running list all the time of things that have not been invoiced.

16036695159

43:38 Okay. Can you?

AARON

43:39 So, it should be right there, but you can also come to the invoice menu... and then you want to look for things they have not been sent yet.

16036695159

43:49 Have not been? Yes. I've not been built, you know, job is open still open and not finalized. And...

AARON

43:58 Right. So you can just run this report for things that are unpaid and sent. So you have that list right here as well. These are jobs that have not been.

16036695159

44:09 Are you able to export? Yeah, I can see you can export that to a spreadsheet. Perfect. Absolutely. Now, what about open invoices? And you run a report showing your open it, you know, receivables, what's outstanding?

AARON

44:25 Isn't that the same as unpaid that you've...

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44:28 No, I want to know what is receivables is, yeah, but can you run an aging summary of what's old?

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16036695159

44:39 Like when we had Wintac, we could go in and pull a report, but an aging summary would tell us what's unpaid and how if it's 31 to 30 30 to 60 60 to 91 20.

AARON

44:54 Yeah, I can run this in. It'll, be... in order but I don't think it groups necessarily. Yeah, exactly.

16036695159

45:04 Anything summary. Okay. That's what I'm asking because we need, sometimes you need to make sure your receivables match... in your service software and it matches what's in Quickbooks. You know, I'm saying.

AARON

45:21 This would be the same list. I just think it's not going to be grouped in groups of 30 60 and 90, but it's still the same invoice that's outstanding. These are all, this is all a list of unpaid invoices that have been sent and it's going to be in order, but it just isn't gonna be grouped the way an aging report would be grouped.

16036695159

45:46 Okay. Okay.

AARON

45:50 But you'll still see the same, all the same information that you would from an aging report.

16036695159

45:56 Where are you guys located?

AARON

45:58 Raleigh, Durham, North Carolina.

16036695159

46:01 Nice. Now, can you pull a report that shows what's been built in a certain timeframe?

AARON

46:10 Yeah, I think you can, when it's...

16036695159

46:14 Hi, nice to you. But these are things that no, I want what has been billed since from may first to may 30 first.

AARON

46:22 Has been sent from may first to may 30 first.

AARON

46:45 I'm not sure about that specifically. I know, I see, you know, you can do the due date. So, I'm assuming that when you send, when you send it between, may, you probably have like a it's do by a certain time period like, okay, within 30 or 60 days, yep... that 90 or net 30 or you can search, you can search this by when things are due by and when they're created by.

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AARON

47:14 So if you're sending, if you're creating it in may and sending it, may, you can run the report here created... you know, by certain time for.

16036695159

47:25 Okay. And then you got to export it to excel and then treat it from there. Okay. Yep. So that's one of the problems we're having is making sure that everything has been, that has been invoiced has been sent over to Quickbooks to making sure our month map.

AARON

47:45 Got ya.

16036695159

47:54 Alright. Is there anything else you want to show me too?

16036695159

48:01 Pending accounting system?

AARON

48:04 Yeah. You should be able to run this report for pending accounting system like... it's... or sent. So, I think this is, it's not been sent yet. It's pending.

AARON

48:28 So, this, the only other side of this that I probably haven't we talked about briefly was like things like scheduling dispatch, board, things like that... but you should be able to create the invoice track these invoices in this. And then, you know, see what's been sync to the accounting system and not... so, yeah, I, it sounds like what you're really worried about is, you know, letting things slip between the cracks between service, trade in the accounting system.

16036695159

49:02 Hello, right?

AARON

49:03 Yeah. And this should be, you should be able to run this report in such a way that you don't have to worry about things slipping through the cracks.

16036695159

49:12 Right. Well, that, that's exactly what I need to know. Is it because I, I'm very worried about things slipping through the cracks and our financial is not being correct. That's a huge concern of mine. You can't be a profitable business if things are not accurate.

AARON

49:31 Right.

AARON

49:36 No, I understand. So, I mean, do you think this would work for you even though it doesn't do the exact aging report? You can still, you know, export this to.

16036695159

49:45 And reports not gonna, yeah, no, it's possible. I want to look at like I said, I want to review what we just went over and I'm gonna actually share it with Chris and I'm the owner. So if you want to give me a call next week or the week after, I can let you know what they think, what are your thoughts on?

AARON

50:03 Gotcha. When do you think you'll see Chris again to review or window?

16036695159

50:10 I know he's taking tomorrow off. So I'm gonna email it to him and I see him every day, but, you know, he's gonna look, we added in between working doing it through regular jobs.

--- Next Steps ---

16036695159

50:21 But like I said, if you want to send it to me, I'm gonna share it with them and I will email it to them just to watch.

AARON

50:29 Okay. Sounds good. Well, I'll shoot this over to you just a minute. I appreciate it, Joyce hope you have a good rest of your day and I'll yeah, I'll talk to you next week. I'll call you to see if you've had that conversation on Wednesday, if that works for you. Is there any particular time that might be a good time?

16036695159



50:50 Wait till Thursday or Friday?

AARON

50:53 Okay.

16036695159

50:54 Beginning of the week is crazy. I'm sure.

AARON

50:59 Okay. Okay. Call you at 12 and I will send an invite over just as a reminder that I will call.

16036695159

51:08 Thank, thank you, Aaron. Have a great day. Have a good day. Bye bye.

*The End*