



ServiceTrade Demo with Protemp Mechanical, Inc

Alec Ashby with Protemp Mechanical, Inc
Recorded on 1/17/23 via Zoom, 45 min.

Participants

SERVICETRADE

Alec Ashby
Territory Manager

PROTEMP MECHANICAL, INC

Marty Reich
Owner

OTHER

Darlenem

Darlene Johnson

Topics

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Transcript

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

--- Call Setup ---

ALEC

0:00 Hey, Marty, can you hear me?

MARTY

0:02 Yeah. How are you doing?

ALEC

0:03 Doing good, man. Doing good. How about yourself?

MARTY

0:06 All right. Looking forward to seeing what you got here.

ALEC

0:10 Nice. Yeah, no, I'm looking forward to showing it to you. I was talking with Darlene last week and I think that there's some things you'll like. So, yeah, good to have you here. How are you doing, Darlene?

DARLENEM

0:23 Doing well. Thank you. How are you, Alex?

ALEC

0:26 Doing good, doing good. You know, Tuesday is just one of those days where it's just like, I don't know how to feel. It's like not Monday, but it's not Wednesday. So, it's just like it's just Tuesday. You know what I mean?

DARLENEM

0:38 You go there, you go. Got it.

ALEC

0:42 And then, are you guys all joining separate or some of you guys together or?

DARLENEM

0:49 I have Matt here with us and Chris will be joining, he's in a meeting, but he'll be joining us as well, just so Matt, Chris and I will be together on this end.

ALEC

0:58 Okay. Okay. Cool. And then, what was matt's? Role? Again? I didn't quite catch that from last time. I don't know if we spoke about Matt last time, but Matt, what's your role?

DARLENEM

1:09 Service tech. So, I guess the end user here.

ALEC

1:13 Okay. Okay. Cool.

MARTY

1:14 Yeah. We can definitely cover that end of it today. In the management. I'm trying to retire some day.

DARLENEM

1:24 He's he's coming in the coming into the office.

ALEC

1:28 Okay. Okay. Well on that, Matt, I'm sure... that's exciting or I'm not sure how you feel about that, but I hope it's something that you look forward to. Cool. And do you want me to wait for Chris or do you want me to go ahead and get into it?

--- Call Setup ends ---

DARLENEM

1:41 Let me see how much longer has.

ALEC

1:45 Yeah, for sure. Take your.

MARTY

1:46 Time, I can give you a rundown and kind of what I wanted to go over real quick though.

ALEC

1:52 Great. Yeah.

MARTY

1:52 One of our big things is quick book integration. We had nothing but a nightmare in our last system. Okay. More than a nightmare. So, wow. Okay. And then do you guys do job costs on your software?

ALEC

2:07 So, yes. And no. So, it just kinda depends like, are you just talking about like gross margin? Like just getting an idea of your profit margin and stuff like that or what do you kind of mean by that when you?

MARTY

2:19 Yeah, kind of well, can you, can we do it by job or not? We never did that before, but that's kind of what we wanted to do.

ALEC

2:27 So we do, in short, I'll show you that... we also just acquired a company called Northboundary, which does a little bit more fancy stuff pertaining to that. So I can maybe send you some resources on that after the meeting as far as the Quickbooks integration. I definitely know about it, but I'm also not like the Quickbooks guy over here, so to speak, I think I told Darlene that a little bit, but I'll kinda go through how it works today. And if you need to talk to someone that speaks a little bit more accounting or maybe a little bit more in depth, I'd probably defer a little bit to our Quickbooks expert. Dan. She actually used to work at another shop out of Texas. I believe before working with us, she actually implemented service trade. So if you guys like what you see today but need a little bit more Quickbooks information, I'd probably recommend going in that direction, but I do know about it and I can explain it to.

MARTY

3:22 Yeah. All right. And how about... you can do quotes a POS in your software, right? Right?

ALEC

3:29 So, so we can do quotes. One of the most popular ways we quote is something we like to call the deficiency loop essentially if one of your technicians is out on a PM or something along those lines, they find a repair, they can report that repair. The office can quote that out. I'll kinda go through that workflow today.

MARTY

3:49 That's kind of what we do right now. It's most of it's done in the office, but we have a form that detects right up for additional work. So, I don't know if you guys can do PDF forms in your software?

ALEC

4:02 Yes. So we can. So like I'm assuming like a maintenance checklist or something along those lines.

MARTY

4:07 Yeah, exactly.

ALEC

4:08 Yep. Yeah. So we do that. And I was gonna, I was gonna show you that today to.

MARTY

4:12 Okay. All right.

ALEC

4:14 Because it seems like Darlene told me last time that you kind of want whatever you guys if you guys do move with something else that software to do pretty much everything but accounting? Is that kind of where you're at?

MARTY

4:25 Yeah, we kind of operations. I want everything in a box quotes, dos, equipment, history, work orders, and we want the work orders easy to work with. If we can. I'll tell you I'll be honest. The last one we had build ups is it was a mess, just a total mess... cool.

ALEC

4:47 Yep. And yeah, Darlene told me that last time we talked to her and I'm sorry you had that bad of an experience. I can say for me personally here at service trade, we take the people we partnership with pretty seriously. We don't just sign up anyone that comes through the door. I haven't really had, you know, I think I've I can't even know how many people I've signed up. I think I've only had one person ask me to cancel. So, you know, just like any other software company, you know, obviously you're gonna have those, but I'm hoping that, you know, regardless if you go with us or not whoever you go with next, you don't have that experience. Again. It sounded pretty wrong.

MARTY

5:24 So it was, well, sit just totally screwed up our Quickbooks. We had to re, enter. Everything took us months to get the invoices out. It was nothing against them. Well, it is a set implemented and it didn't work. And I mean the sport was okay, but automatic anyway.

ALEC

5:45 Sounds, yeah. A couple of months, I'm sure those were, there were some phone calls that had to go out to, does not sound fun.

MARTY

5:55 So, yeah, that's my input. I don't know what all wants to look at something else and Chris, they do most of the work on it in the office. I mean, I'm the owner of the company. So I look at the numbers and the flow and I'm also in the field. So the tablet thing I'm sure will be fine. I mean, you maybe can show something on that, but most of them work.

ALEC

6:17 Right. What I figured I'd kind of go through today is I was gonna, you know, show you some, you know, simple stuff that most softwares have just to make sure we're checking those boxes, but I really wanted to put an emphasis on, you know, quoting the mobile app and then, you know, kind of some of the things you mentioned right there, equipment, tracking, things such as those things.

MARTY

6:37 And...

ALEC

6:37 I'm thinking that probably if you guys like what you see today, we'll probably have to set up a meeting with Diane just because of that experience you had last time now, I can't remember if I asked Darlene this last time or not. Do you know if we're on a Quickbooks desktop or online?

MARTY

6:51 Stop enterprise. Okay. Yeah, so.

DARLENEM

6:57 That...

ALEC

6:57 Is necessary. We can definitely, we can definitely set that up. Sorry. What were you saying?

MARTY

7:05 No, we don't have long line Quickbooks, but we have enterprise.

ALEC

7:09 Okay. Okay. Yeah, perfect. Yeah, we have customers that use both, most of them integrate with it. Some of them don't it's completely up to you if you wanna do that or not. And then, you know, we have like a 94 percent customer attention rate. So most of them are pretty happy with it. Now, what I will say is that, you know, while the integration is important and we definitely don't wanna make sure you have an experience like that like you had with BuildOps. Obviously, you want to have that with us. People don't necessarily buy service trade just because of the integration alone. They typically buy it because of the, you know, quoting features, customer engagement equipment, tracking, some stuff I'll show you today, but I also wanna make sure you're comfortable so I can send you some resources on that. I'll explain it. And then if we need to go any deeper, I can get people involved over here to kind of explain it to you guys and make sure you're content with how the data maps and all that stuff. So that you're not sending out invoices four months.

MARTY

8:04 Well, we do a lot of portal but probably 80 percent of our invoice are on portal, so it's easier to run those through Quickbooks than the other software. But we'll see how that works.

ALEC

8:15 Right. Yeah, because she, Darlene was telling me you guys do a lot of work with like Oracle. I believe. Nice. That's pretty cool though. I know they're a pretty big company out there. Yeah. So if you guys wanna do that, I mean, a lot of our customers do like to invoice out of service trade just because of the, you know, they can pay right then and there, there's kind of customer engagement features. But if you'd prefer for whatever reason just to invoice out of Quickbooks, I could definitely walk you through that workflow. And then like I said, if we need to get an involved to kinda show you talk a little bit more to the accounting piece of it, we can definitely do that as well.

--- Call Setup ---

MARTY

8:49 Yeah, we'll probably want to do that, but we'll see what we. All right. That's all I have. I'll let you move on.

ALEC

8:54 Okay... cool. Well, did I don't know if Darlene is?

DARLENEM

9:01 Yep. So here.

ALEC

9:04 Okay. I didn't know if we, Marty were just chopping it up and anyone was on the other end? Okay, cool. Well, guys, I do appreciate you taking the time to speak with me today. Again. My name is Alec. I'm a territory manager over here at service trade. It's kinda the way I run these initial meetings is first, I mean, we already kinda talked a little bit, but I was gonna hand the Mike to you guys kinda learn a little bit more about your business, some of the bottle next you guys are running into. Next, I'll go through a brief presentation kind of telling you about service trade, who we help, why we created all that good stuff. Then we'll walkthrough a brief demo of the platform. Then if everything looks good, most likely we'd be setting up a accounting meeting with Dan or doing whatever next step we need to do. Does that sound fair to you guys?

DARLENEM

9:48 Yeah.

MARTY

9:49 I think so. We definitely want to have a meeting with Diane.

ALEC

9:52 Okay. Okay. Cool.

MARTY

9:53 Accounting stuff.

ALEC

9:56 Well, you know, I just talked with Marty a little bit about what you guys are looking for, but I do wanna just open the four on to you guys on the other end, Darlene, and Chris, and Matt, you know, what kind of brings you guys here today?

--- Call Setup ends ---

ALEC

10:08 And what's kind of top of mind for you guys? Because obviously, I talked to Darlene for quite a bit about a week ago, but I just wanna make sure you guys if there's any outstanding concerns or anything top of mind, I'm giving you an opportunity to speak as well.

DARLENEM

10:24 I can see this is, so our general workflow... darling creates work orders, schedules, the work, the technicians obviously do the work... the... activities, a big part of it, we have a lot of issues with is the technicians information from their tablet back to the office so that everybody has all the information that we need to do what we do... but I can see what your platforms like it's just how I was gonna want something that's efficient and easy for the technicians to us to be able to input the information that they have. So that we have that in the office so that we can now, you know, work through those things. And I, you mentioned a little bit about quotes. We don't have the technicians quote jobs. Okay? They turn in a quote request for what work is needed. Okay? We produce the quotes in the office and those get sent out and then reschedule if they approve. So we do not have our currently have or technicians doing quotes or receiving payments that's all done in the office. So, you know, we have a quote request form hopefully that can be integrated into your software or existing form. I don't know if that's true or not. But we are unfortunately, we're told by BuildOps that they were not able to integrate our forms, which is ridiculous. So we, we'd like to be able to utilize what our guys are already familiar with. I think that would probably be the most efficient for everybody, but we'd like to see how that works.

ALEC

12:13 Okay. And with that quote request form, is that something embedded in the software you use now? Is that like just a fill able PDF or could you tell me a little bit more about what that actually is?

DARLENEM

12:25 It is a well, I don't even know if we have it set up as a table?

MARTY

12:30 Yes, it is. Yes, it is.

DARLENEM

12:31 We do so. Yes.

MARTY

12:35 I mean, it could probably be tweak some it's not officially viable, but we, you can do it on tablet?

ALEC

12:42 Okay. Yeah. So I mean, you could make it available PDF and service trade. I could show you that, but really the deficiency loop, like you kinda said a lot of our, you know, we do if you wanted your technicians to quote or invoice in the field, you could give them those permissions but most of our customers, they don't do that because they don't want them doing that or deficiency loop. It kind of acts as like, you know, quote requests. But if you want a little bit more detail than what I show you today, you could absolutely put a form in the system and they could upload that to the work order as well. So I could kind of show you both of those things to see how it works and it'd be up to you guys on which one would you prefer or would you rather do both just completely up to you? So I could go through that today. And then I know you spoke a little bit about, you know, tracking your equipment. I'm assuming like, you know, past work order history or, you know, serial number stuff along those lines. Is that something you guys do now or could you tell me a little bit more about how that looks now?

MARTY

13:43 We're doing it now, but we'll probably have to start over with the new software. Okay? So that's the big thing we wanna do because the customers, you know, especially in the tech school on a job, somebody else is out there before they want to know what was done.

ALEC

14:00 Do the techs have access to that information in the field or do they typically have to call the home office to get that information?

MARTY

14:06 Well, all the software we had in the past, you get about 20, you can look at 20 past visits out there. Okay? Gotcha. Cool. You see what was up done in the last few months? Okay? Off the.

DARLENEM

14:24 And build ups, you were able to build out, you know, roster customers equipment. But the issue wound up being is that each tech could make a new piece of equipment, but we couldn't delete it. So we wound up with a ton of duplicates. Wow, you know, one type would name it the customers, you know, internal identification, number one type would make it their serial number. Either way. We wound up with

duplicates, and then we couldn't delete them. So I kinda get into the to, but it'd be nice to know that we get at it.

ALEC

14:59 Right. No, I.

MARTY

15:03 Yeah, I just think before you get started, I don't know if darling told you we're a small six tech right now. We might get to 10 specialized refrigeration, we work for high tech. We're not really. Yeah, we got an H fac license, but we're not really H, fact companies more refrigeration.

ALEC

15:22 Yeah. I think Darlene told me you guys do environmental test chambers, is that?

MARTY

15:28 That's great.

ALEC

15:28 Yeah. Yeah. So I actually created a asset for that and also a checklist. So, I mean, obviously, these demos are a little bit imaginary but that'll be more pertaining to you guys. Now, I know you kind of alluded to right there, maybe get up to 10 guys, 10 trucks. I mean, you guys, and it seems like to Marty you would like to retire at some point. I mean, is there any really goals top of mind for you guys this year?

MARTY

15:54 Well, we'd like to increase our sales. We'll see how that goes with everybody's saying we got a recession, but yeah... I.

ALEC

16:04 You know.

DARLENEM

16:05 Our goal, our goal is to find a software that works well that everybody is comfortable working with so that we can make sure we're getting all of the money that we are due to get for the services we perform, and that's been a bit of a challenge. So, so that's where we're looking to have, you know, a system in place that's you know, intuitive for the technicians to use and, you know, doesn't require, you know... a ton of clicks to get where they need to be to make sure that we're you know, documenting stories and labors and parts use, refugees, and such.

ALEC

16:45 Okay. Okay. Cool. Yeah, I think we can definitely be that potential partner for you guys, but I'll let you be the judge of that. But I appreciate that clarity. And

speaking of, you know, everyone being comfortable, I mean, is there anyone else that I need to get involved outside of the people on this call today?

MARTY

17:01 Just the service decks. We'll have to learn the tablet?

ALEC

17:04 Okay.

MARTY

17:05 They won't have to learn anything else? Just what they're doing in the field?

ALEC

17:10 Cool. And I'm more than happy to, you know, maybe do a demo just with them or if you just want me to send over some information, whatever you might wanna do, we could go through if we get to that point, how that looks like for them. If you guys were to onboard with service trade, definitely don't want to get ahead of ourselves here but more than happy to talk with them whenever that might be appropriate. And then I know you kind of alluded to, you know, having these goals, you know, you want more sales, you want a software that's gonna help you make achieving your goals easier and not harder.

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ALEC

17:40 Do you guys have like a busy season or a target implementation period that you're looking for? What's kind of like your timeline look like?

DARLENEM

17:51 We're we're pretty consistent throughout the year. I would say around probably, you know, December around Christmas time, there's a lot of, we work for basically all the high tech companies that are here in a valley. So they tend to have shut down around that time. So we might get a little slower what December into January. But most of the time, I mean they're always working, they're always testing, they're always, you know, doing and so, so their machines are running. So we're I mean, we stay pretty consistent throughout the year.

ALEC

18:30 Okay. Gotcha. So it seems like you could pretty, you could pretty much implement a software. I'd be doing it in July, isn't too much different than doing it in August. Is that based on what you're saying?

DARLENEM

18:41 Installed jobs in the past few years, but right now it's pretty much just focused on service.

ALEC

18:47 Okay. Okay. Cool. Well, that was, you know, pretty much all I had for you guys. I mean, do you guys have anything for me before I hop into it here?

MARTY

18:54 I... do.

DARLENEM

18:57 And... see what?

ALEC

19:01 Okay, cool. So I'll just go through a brief slide show. I kinda giving you some background. We'll hop in the demo, then we'll work from there. So just give me one sec here. I'm gonna go ahead and start sharing my screen. So you should be seeing like a service trade logo down here. Do you guys see that down here? Okay. So, Marty, Matt, Chris, Darlene, I do appreciate all you guys taking the time out of your day to speak with me. So service trade, we actually work with about 1,000 customers between the US and Canada. We work exclusively with commercial service contractors. Like I said earlier, we have a 94 percent customer attention rate meaning that if 10 companies sign up with service trade nine stick with us long term.

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ALEC

19:46 And really the reason that we even created in the first place is our CEO, Billy Marshall. He essentially saw a huge disconnect between commercial service contractors, their customers and their customers, seeing the value that you guys bring the table. Now, at the time, there are a lot of like residential softwares out there, a lot of softwares that were built for other industries. You know, a lot of one fits all softwares. So what Billy ended up doing was building a commercial service software that not only help you guys be more valuable to your customers but also help you grow your business and make more sales. And there's really three main ways that we do that. So, first things first is operational efficiency. We know right now with the, you know, labor shortage, going on gas prices going up, you know, all the crazy stuff going on in the world. There's never been a more important time to help you guys get the most out of the resource you have today. So service trade is gonna make sure that you operate as efficiently as possible. The second way that we help companies grow is something we like to call the Amazon experience especially around the holidays. You know, customers have gotten really custom that Amazon prime experience. So we're going to help you deliver a similar experience to your customers. This can mean a variety of things. This could mean like an in route notification, you know, letting your customer know that, hey, we're on the way. I, this could mean, you know, sending them a visually appealing quote that they can approve right then and there, there's really a variety of ways you can capitalize on that with our system. Really, the goal of that is to position you guys a premium brand, so you can charge a premium price and not only keep the customers that you have, but also attract the prospects that you really wanna work with. And then the third and final way that we help, you know, companies increase their revenue, so to speak is something we like to call the deficiency loop. Essentially, we're gonna streamline the quote repair process. We're gonna make it venient for the tech to

report more repairs, get more pipeline back to the office. On the office end, we're gonna make it easy and seamless for them to create a quote and do it in a timely fashion. And then on the customer end, we're gonna make it easy for them to interact with your brand, give them a button to click, approve. If they have an issue with it, they can click request changes. We're also going to give them all the visibility they need to make an educated decision.

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ALEC

22:07 Now, these three workflows along that's really some of the main reasons that our average ServiceTrade customers seen an increase in 23 point four percent in service repair revenue. Now, keep in mind that it's just an average, some of our more high performing customers or some of our customers that come from a more traditional paper process. They've seen more than that. But before I hop into it here, I mean, is there any questions you have based on what I just said?

DARLENEM

22:34 I don't think so. I mean our typical workflow, you mentioned like, you know, providing a quote, our typical workflow, we have basically two types of customers. We do have time and materials, customers to issue a blanket purchase order at the beginning of the quarter or whatever time frame. And we build those customers time in materials. Then we have customers who don't have that, who, when they contact us, if they have a piece of equipment that needs service, has an issue with it, we'll quote them service visit. Well, we, we'll send a technician out technician will then diagnose and turn in a quote request. And then we'll quote the repair from the office end and send that out. So we don't at this point, we're not, and I don't think we would start doing that having technicians produce quotes.

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DARLENEM

23:31 We're gonna keep that as far as I know we'll be keeping that in office. So, you know, it might be a little bit different because we, I don't think, I guess we would be considered commercial because we don't do residential where we were might be a bit different than some of the you.

DARLENEM

23:50 Very...

DARLENEM

23:51 Companies that you work with. So, you know, we're working on equipment in inside, you know, laboratories rather than, you know, large equipment and systems. So see we'll have to kinda here.

ALEC

24:06 Right. And I do just wanna say when I say like, you know, report or repair, they're not necessarily quoting it. All they're simply doing is notifying the office that,

hey, I need this repair and it's kind of up to the office to send it out. Most of our customers. Like I said, regardless of size, most of them don't quote or invoice out in the field. And then I also wanna say here too is that service trade is very permission based, like you can get very tactical with it. So, like for example, if you don't want a technician, you know, creating an asset or if there's anything, you don't want the technician to have the, you know, ability to do, you can absolutely, you know, discern what you want them to do and what you don't want them to do and give them that permission. Does that make sense?

DARLENEM

24:56 Yes.

ALEC

24:57 Okay. I'll go ahead and hop into it here. So if my computer will work, go ahead and get out here. So where I wanted to start off today is basically how locations are organized in ServiceTrade. So since we were built for the commercial service industry, we know how important it is for you guys to distinguish that Bill to and service address. So for example, here, if I'm working with the target, let's say I'm working with five targets, each individual target will have its own page, but all live under this corporate umbrella or this billing location. And if I click on this target in pittsburg, this is basically what a location page will look like in service trade. So I just wanna point out the main things on this page. If you have any questions about anything else or anything stands out, feel free to ask. But one of the first things that we have here are our services. So these services, these can be either your recurring services like we were talking about or these can be just your simple, you know, reactive service calls. As far as how these recurring services are set up, you can tie each recurring service to a specific asset. You can put a specific pricing contract on that service. You can put a brief description of whatever you guys typically do. When you go out to do that quarterly service... you can put the frequency. So how often are we going here? Is it annual, it, semi annual stuff along those lines? And then you can put a brief items list. So what's typically gonna be on the work order? Now, the idea here is that we set this up once and we forget it. So ServiceTrade is gonna put it on a rolling clock. So between the service dashboard and other reports, we can run, none of these jobs will slip through the cracks as well as when you go to create the work order, it'll be about 80 percent of the way there. I know that was a little long winded there. Does that make sense?

MARTY

27:14 You're talking about like a PM visit here?

ALEC

27:17 Right. Yep. So this is really like I said, these could be reactive service calls. So like if you have someone call in there's various ways to create that. But this is how you set up the PMS and that way none of them are slipping through the cracks. And when you go to create the work order, it's not too much trouble, so to speak.

DARLENEM

27:39 They give us the equipment. How many of them don't call us for another two years?

ALEC

27:46 I'm sorry, I didn't quite hear you there.

DARLENEM

27:52 So this would be, this would be, where did you?

ALEC

28:01 I, I'm just can't hear you right now?

DARLENEM

28:03 Yeah, where?

DARLENEM

28:05 Yeah, we're all thinking of what you just did. So this.

ALEC

28:09 Okay. No worries.

DARLENEM

28:11 This is, this is a one time setup. This is on a continual basis of what you're saying.

ALEC

28:17 Right. So, let's say for the, in simple terms, for example, let's say I sign up a customer for a quarterly PM. If I know the piece of equipment that I'm working on, I can associate it with that. I can basically create a template for the work order. And there's various ways that service trade will remind me that this PM is due. That way the work order creation process is more automated. It's not as much as like I have a spreadsheet or I have some sticky notes. We need to schedule it out. It's an automated process. So it's gonna remind you through a variety of ways.

DARLENEM

28:53 Okay. So that, and that's great. But that's not how we generally work. I would say 90 percent of our work.

ALEC

29:05 So it's like 90 percent of your work just like reactive service calls.

DARLENEM

29:10 Right.

ALEC

29:11 Okay. So one way to do that not to shift gears too much here, but I'll kind of point you towards the dispatch board. This is great for our reactive service calls or ones where people are just calling in.

DARLENEM

29:26 People aren't just calling it like Chris said, we basically quote jobs and we'll send out a quote. And then on... the quote has been authorized and we're issued a purchase order. Then we go out on that job. So it's not that we're calling in but we're working off of that authorization.

ALEC

29:48 Okay. No.

MARTY

29:49 Not all of them, you know, like our big clients, we have links, they call when they need us. We just...

DARLENEM

29:55 Yes. Right. So, the ones that I would, we would set up in advance... would be quota jobs. So how would you set that up?

ALEC

30:09 Yep. So if you wanted to just send out a quote from scratch, you could absolutely do that. So what you would do is you'd go to the location that you need to create a quote. From here. We could just click add a quote on the right here. Basically to do that, there's different quote types if you wanna get that specific. So what kind of job are we quoting out? I'll just say it's a service call. From here, we can pick a customer specific pricing contract that's gonna pull up their markup rules. It's completely up to you. If you want to take advantage of that or not. You could also put an expiration date on that quote. And then from here, I could just simply click create quote.

ALEC

30:57 Now, if you already had a service in the system, you could apply that service to this quote. And if this is a relatively unique quote, we can always write it up from scratch. But what a lot of our customers like to do is use these things called quote templates. Now, these are your templates. We don't force you to use any kind of verbiage or force you use any parts labor items list. So just to show you for demo purposes like a compressor replacement template, this is one of the better ones we have in the system. So it kinda illustrates how it works. We can pull here a brief description of what's typically going to be on the quote. We can put the items that we typically add here. If we go here, we can see a list here. If we need to update any prices or any cost. This is the demo environment. So sometimes our on tracks, you know, expire stuff along those lines, kind of speaking on the job costing piece. I can see my gross margin here. I can see my total cost, my total price. And then if I need to add a service or a deficiency. So if it's a repair or service, I can add that here. So for example, if we know the unit they're talking about, we could associate it with that unit or if we don't we can always associate it with the building. So I'll go ahead and

do the test chamber here. We already had that service in the system. I could apply it but I'm just creating this one for scratch just as an example. So I'm just putting in something simple here... and we can go ahead and save this. And then from there, if we want to send it to the customer, we can send it to whatever contact we want. So I can send that over to you guys. Just give me one sec and over Chris, and then Marty... and basically I'll send this over to you. Now you could attach pictures if you wanted to. You could attach, you know, stuff like that. If your guy goes out there in the field first, I can kinda show you how you could gather information. But if you just wanted to create a quote from scratch without going in the field that's one way you could do it. So if you guys wanna look over that quote, what you'll notice is that there's an approved button here, so they can approve it. If they like what they see. It's completely up to you guys on how you want to format it stuff along those lines, these are your own custom TS and CS. And then once you're approved, you can create the work order. So.

DARLENEM

33:30 So, what is, so, let's go from there. So if it's approved... how does it come back to us?

ALEC

33:38 So if you just go ahead and approve it, I could show you it'd be easier to show you then I'll tell you. But in short, when they approve, it's, completely up to you on how many emails you want ServiceTrade to send to you can set it up as an email notification like, hey, someone approve this job. And then from there, you can just create the job from the.

DARLENEM

33:58 So in our situation, we would need to have not just an approved well, but we need either a purchase order or a credit card to go with it. So, how would that work on your system?

ALEC

34:10 Great question. So, for the purchase order, it's completely up to you guys if you need it and you want to set as a default that for them to approve the quote, they have to submit the purchase order, they can do that. And you can see right here that there's a field for them to add that purchase order. Now, for the credit card, I guess to dive a little deeper into that. Are you guys getting paid before you do the work or after you do the work?

DARLENEM

34:36 After?

ALEC

34:37 After...

DARLENEM

34:39 That would be the authorization. So they would that they would attach the credit card you're asking for just a credit card. I'm sorry, asking for just the purchase order number, but they're not actually attaching a hard copy. Is that what I saw right there?

MARTY

34:56 No, darling. We're gonna, we're going to have to do work around on that. This approved is not going to happen that often. It'd be different if it was a blanket. We had a blanket purchase order, but otherwise we're gonna have to wait for the po.

DARLENEM

35:08 So, but this isn't for the, they're just approving the quote. Then they would send the po. In addition to that.

--- Pricing ---

MARTY

35:17 Of course, I mean... 90 percent. Well, 90 percent of our customers not gonna approve them. The quote. They got a sense of their purchasing department. So we're in a different game than I'd be different if you working for a facilities manager at 100,000 dollar po, that this works fine, but that's not our deal, so.

DARLENEM

35:39 Also Alec, the or, well for all of our customers that don't have a blanket purchase order. So, those ones, like I mentioned, we're billing materials, everything else is quoted a fixed price. So when we send out a quote, we're giving a description of the work we're performing, but we're not breaking out partly refrigerant materials that's it is as a fixed price.

ALEC

36:07 So, you're doing a lot of flat rate pricing. Is that what you're basically getting?

DARLENEM

36:11 Correct?

ALEC

36:12 Okay. And is that something you're absolutely going to have to keep doing or is that something that?

MARTY

36:19 Okay. Yes, that's our game.

ALEC

36:21 Gotcha. Gotcha. Well, I do apologize guys. Maybe I should have clarified that, but typically, when I talk to commercial or industrial companies, they typically don't

do a lot of flat rate pricing in our platform. We don't do flat rate pricing. So if that's a deal breaker, you know, service trade, it's just not gonna be a good fit for you guys. So, I mean, is that kind of, do you have to, do you have to do flat rate pricing stuff along those lines?

DARLENEM

36:50 Yes.

ALEC

36:50 Okay. Right. Yeah. So I do apologize. Maybe I should have clarified that. That's just the first time I've heard that. I know typically like if I talked to a commercial refrigeration company, they're not doing too much flat rate pricing. I guess if, you know, if you're not satisfied with SmartService, because the problem, the thing is that makes you guys unique is that you have some residential workflows, but you are commercial. So, you know, that's it's definitely pretty unique. So to speak. I haven't really heard of too many people doing flat rate that are on commercial. Probably what I'd recommend maybe checking out is, you know, service tied in. I don't know if you've ever talked with them. I know they do a little bit of both. They got started in residential, but they're kinda starting to roll out some of their more commercial features, so to speak. So you could probably get the best of both worlds. I don't really know too much about if they do flat rate pricing or what that looks like with them... but that's probably what I'd recommend.

MARTY

37:49 Well, let's back up a minute here. So your quotes... I'm not going back to build up, but they had a feature where you price all that out. But then you, when you said the quote, you could hide all this. Your software doesn't do that.

ALEC

38:02 No, it does. So I just format it that way just to show the capability. But if we go here, if I wanted to, you see where it says detail level for a customer, I can change the detail level to, you know, grand total. Only there's a variety of options I could do here. So if I needed to change anything, I could change the way it's formatted. If you guys do grand total only or something along those lines.

MARTY

38:31 Well, we do both, but probably 75 80 is six price. You know, we do have customers. We have to break it down but that's not the majority.

ALEC

38:43 So when you say fixed price, are you saying like because like for example, like if I talked to a company that's like just for a simple example, like 50 percent residential, 50 percent commercial, they do age back but the residential side is flat rate. Let's say that, you know, Tammy needs to get her broken compressor fixed. Typically when they're doing flat rate pricing, it's gonna cost 500 every time. And the customer doesn't see... any line items. It's just compressor fix 500. And that's all they see is that kind of what you're talking about for that 70 percent? Yeah. Yeah. So like I mean, so yeah, we do, we just don't do that in our system that's just because we were

primarily built for commercial and most commercial service contractors aren't doing that. Now there are, you know, workarounds for it, but I definitely want to recommend it for, you know, people that do 70 percent, most of the people that maybe do that have like, you know, three or five percent of that, of their business needs that it's most of the time, just the owner of the facility or something along those lines. But we don't really have a workflow that's gonna work for that flat rate pricing, just being completely honest.

DARLENEM

39:57 Well, I appreciate your honesty and not just saying, hey, no problem. We can make that work as that's what tends to happen when we're getting a demonstration. So we appreciate that.

ALEC

40:11 Right. Yeah. And, you know, to be fair to those people, you know, a lot of us, you know, just got some manager down our back or something. It's not like that over here but you never know what their people are telling them but I just try to shoot people straight and I usually think it comes back and it typically has. But yeah, I mean if you guys ever move away from that flat rate or you increase the amount of preventative maintenance you do. So if you go from, if you really want to grow the PM side of your business or you want to get away from that flat rate, there might be some alignment there. But like I said, just kind of based on what you've told me here, I'd probably maybe recommend taking out checking out service tight and that's probably what be my recommendation.

MARTY

40:51 I was looking at them, I have a lined up a demo with them but... they're they say they do commercial and residential. So.

ALEC

41:01 Yeah. So, so they do, I think it actually could potentially work for you guys since like I said, you have some things that typically more residential folks work. I just know that some of our customers have come over from them because they kinda over promised on the commercial side. So if you guys did move forward with them or did check out them, I maybe would recommend getting a commercial reference or just being a little skeptical on that part of it. But I mean, I know a lot of people are happy with them. I've heard some mixed things but I think for you guys, I think you'd probably like it more than maybe people that talk to me, you know?

MARTY

41:36 Yeah. Well, the problem is our business so specialized, we don't work for facilities managers. Very often, we work for the end user, right? That's why we got to go through the quote and they got to get it approved through purchasing. And now it's not easy, but that's what we have to do because our end users can't approve the work they put in.

--- Pricing ends ---

MARTY

41:59 We send them a quote. They have to put in a rec to their management and, you know, it could take a week sometimes to get a job approved or longer.

ALEC

42:10 Yeah, no, I'm sure the niche in some ways, you know, really helps you guys, you know, stay competitive, but in other ways, I'm sure. There's a lot of delays like you just alluded to. I mean, like for companies like you, I've signed up companies like that where they're not a typical company. And the reality is there's not gonna be like an environmental test chamber software out there because for example, like you kind of alluded to, I'm sure, you know, a lot of people kind of throw down people's necks, you know, like H vac, stuff like that, you just have to find out what are the deal breakers for you. So if like that's why that rate pricing, you gotta make sure that company or that vendor checks that box and then you're probably just gonna have to accept that there's gonna be some natural workarounds with your workflow because it's a lot different than most and you probably wanna put an emphasis on just the company values. Do you trust the guy on the other end of the phone as of an easy to work with their team? Because the reality is that, you know, since you have weird workflows there's not gonna be that, I mean, really for anyone there's not that perfect software but especially for you guys, you just got to find out what the priorities are and what you're willing to kinda, I guess be flexible on. So that's what I.

DARLENEM

43:24 Yeah. And that's exactly that's what we are fighting there. We are so specialized and it's we're so different from what everybody else does. It's it, nothing does fit.

ALEC

43:38 I...

DARLENEM

43:39 Greatly again, appreciate your honesty.

ALEC

43:41 Yeah, no problem. I mean you could always go the custom route too, but that's really expensive and then it's more expensive to maintain it. But yeah, I mean, if you guys.

MARTY

43:51 I mean, I can definitely look at.

ALEC

43:53 Let's see if there's any others, but I'd probably just if you haven't demoed tied in yet. I'd probably start off with them. So that's just.

DARLENEM

44:01 Well, I appreciate your honesty Alex.

ALEC

44:03 Yeah, no problem. I do appreciate. I do apologize if I wasted any time. I just...

DARLENEM

44:08 No.

ALEC

44:09 No, at that.

DARLENEM

44:10 No, we appreciate your honesty and your feedback. It helps us know where we need to go. We really haven't had that honesty before. So it's nice. It's appreciate it.

ALEC

44:28 No, thank. Thanks. And it does mean a lot to me and I'm not just saying that.

--- *Wrap-up* ---

ALEC

44:31 So, I do appreciate that from you guys. But anyways, I don't wanna waste any more of your time and I definitely have some people I have to get to, so to speak.

MARTY

44:39 Yeah.

DARLENEM

44:40 Appreciate it. All right?

ALEC

44:41 If any, yeah, no worries. But I do appreciate your guy's time. I hope you guys find something that works better for you, and I hope whoever you go with you have a better experience than you did with BuildOps. So.

DARLENEM

44:53 Thank you so much.

ALEC

44:54 Yeah, no problem.

DARLENEM

44:55 All...

MARTY

44:55 Right. Thank you.

DARLENEM

44:56 All right. Thank you. Bye bye bye.

The End