ServiceTrade Demo with Uni-Temp Refrigeration Inc

Chelsea Payne with Uni-Temp Refrigeration Inc
Recorded on 2/17/22 via Zoom, 1 hour 9 min.

Participants

SERVICETRADE

Chelsea Payne
Territory Manager

Tommy Polcari
Associate NorthBoundary Account Executive

UNI-TEMP REFRIGERATION INC

Kara Ceradsky
Office Manager

Jamie Gilbert
Regional Service Manager

OTHER

17702429812

Jcalliham

Topics

Transcript

--- Call Setup ---

CHELSEA

0:00 Hi, good afternoon.

JCALLIHAM

0:01 Hey, how are ya?

CHELSEA

0:03 I am doing well and you?

JCALLIHAM

0:05 I'm doing good... good.

CHELSEA

0:07 Good. Looks like everyone else says log in and...

JCALLIHAM

0:14 Just talking to Jamie said that he'll be here in just a sick if he's not already.

JAMIE

0:18 Hello?

CHELSEA

0:21 Hello... wait till, look here. It gets her. Sounds good on... Jonathan. Go ahead and ask you why she's bringing that up and running. I don't happen to know your role with the company. Could you please and lightning?

JCALLIHAM

0:37 Yeah. So I again the service coordinator. So I work under Jamie and I also worked for... Jamie's equal in Alabama. So I kind of do both regions, just kinda helping out with... with their needs, a dispatch and the guys, you know, taken quotes, taking parts, ordered stuff like that.

CHELSEA

1:03 Okay, busy... busy.

JAMIE

1:05 Absolutely.

CHELSEA

1:09 Hi, Kara, can you hear us?

17702429812

1:12 I can.

JCALLIHAM

1:15 Hello?

CHELSEA

1:17 So, now that we got everyone up and running, I'll officially introduce myself.

--- Call Setup ends ---

CHELSEA

1:21 So I'm Chelsea pain. I'm an inside territory manager for service trade today, just so you know, what to expect from my meetings. I first want to get to know a little bit more about the companies day to day and your needs. Just ensuring that, you know, what you're looking for that service stripe is a good fit for you. And then we're going to dive in for background information about service trade to more who we are, and then I'm going to show you how the platform works. Would be a mock job if that works for you all.

JAMIE

1:56 Yes.

CHELSEA

1:57 Okay. Because we'll do ladies first. So Kara, if you could kinda just tell me a little bit about what's happening in your day to day, that sort of brings you to today's meeting.

17702429812

2:10 Well, we or... or industrial service refrigeration company, we, and takes out all the time for sometimes emergency repair, sometimes is quoted work that's already been, you know, quoted and, but not, but we have Sage 100. So it's not like a version... version of Sage and pretty much nothing in integrates the way we needed to integrate because we also do job cost and payroll through Sage. And so our time sheet basically... he used to do them on paper and put them on like an excel and then turn them into CSV form to upload into Sage to run job cost and payroll with the same CSV file. But now we did, I would say several years ago, we finally got with

somebody that made us an app, they would at least create a ticket for us and then convert their ticket information into a CSV file. So we can do one master upload of all of our service technicians into our master time sheet file. So that has help. But we still, you know, it's still at, we still have another process to get and then the Sage, all that stuff. And, you know, and I will tell you we've talked to several companies like you... say that they can integrate with Sage the way we would want it to... to make it worth us even doing something different than what we do now. And they can't they're more about somebody going out to a job in an invoicing it right there on the spot. Like our technicians will never be able to invoice for their jobs. They don't know the part... the part, all the invoicing, invoices, all that stuff comes through the corporate office, not through their hands. They have no clue what the charge because most of our parts or drop ship, they don't even put their hands on them into that until they're being installed. So they, you know, and... and especially if it's quoted job, they don't know how much the quotas for, they just know they're a bit there to do the work and get the job. I space and nutshell.

CHELSEA

4:23 Okay. Absolutely. Jonathan, if you'd like to go next and kind of tell me, you know, with your current day to day, some of the cumbersome process is that... you... you... you wish could be solved?

JCALLIHAM

4:38 So, I kinda came in after our current system is in place. And so I don't have a ton of, you know, recollection like the, you know, the medieval times like... like Jamie and Kara would have of how it is before. So kind of everything that I do. I've been trained in the way it goes. I really again, I don't... I don't have a ton of bad experiences with our current setup. The only thing that I would say is a little not cumbersome but redundant is that we... we... we kinda schedule or work through our outlook calendar and then I go and dispatch it each day through our current app and that goes to the... the texts, you know, if there's a way to integrate that where, you know, we only have to internet one time than that... that could possibly be beneficial. But yeah, no, there, there's really like I said, I don't have enough knowledge of what an alternative solution would be to know if our current platform is efficient or not.

CHELSEA

5:45 Okay. Absolutely. We'll definitely dive into all of that, Jamie, your turn.

JAMIE

5:53 Yep. So I'm the service manager. So I'm the one managing and keeping up with all the field technicians. And Jonathan helps me with that, doing the scheduling like he was just talking about with the calendars. Have dispatch in them of the app to their phone. So they get the work orders and know where to go to and from. So on my end, we have payroll built in as well as a PDF document for the customer to have a work order. So all the work we do for these plants, I need to document it, the dates who's completed what was worked all and what we did and did not do, right? And our recommendations so they can put it on file and keep up with it. So overall, I'm looking for a document that has the capabilities of doing those things. I get a little overwhelmed looking at softwares that want us to log all the equipment ID'S in it. I think that would be great. I just get a, where did they can have? Will get 150 customers, 900 pieces of equipment... because I have to physically go out in the field from Florida to North Carolina and get this data. So it's not something that I can just

say, hey shoot me a list that answer this. Now over the 10 years has been here, I've made some lists in word and excel to get started with it. But that's... that's one thing I would like to improve on though is our ability to keep records on specific equipment. So if there's a way to do that... that would be helpful but definitely need the ability to take pictures in the field to put on the documents. And then that we have now does the payroll, I'm... I'm satisfied with it. The way it does it. I think Kara was saying the only way we're going to improve that is if it actually integrates with Sage. And when I approve it in the app, president, Sage for accounting to do their thing. And the infos already in Sage that's dealt with them. We have to manually upload a spreadsheet for that.

CHELSEA

8:00 Gotcha. Yeah. So what I'm hearing from you as sounds exactly like what all of my other customers need and are looking for. So I can absolutely help you with everything you're looking for when it comes to Sage integration. Yes, I have other customers who have multiple different versions of Sage. And so the Sage 100 is something that we can integrate with. I've already contacted my integration specialist. And so after today, as long as like the... the core of service trade, as long as that works great with you guys, then after that, we could set up a meeting with her and then she can kinda go over exactly how the integration works, because sometimes there's different levels depending on what you want it to do.

--- Pricing ---

JAMIE

8:47 Okay. So how does your service work? Is it like a per user platform, right? Or is it unlimited?

CHELSEA

8:57 Hello. So both... so.

JAMIE

9:01 We have 22 users I think now, so.

CHELSEA

9:04 Okay. Is that including office staff?

JAMIE

9:06 Yeah, that's everybody. So we got one.

CHELSEA

9:10 You have 15 service guys, right?

JAMIE

9:12 Yeah, something like that. And then we got than the managers and the health and the accounting office have access to... to pull the file.

CHELSEA

9:20 Okay. So we only base our pricing off of those that are actually generating the revenue for you. So the pricing is based off the technician licenses, your office staff. It's free and unlimited.

JAMIE

9:33 Okay.

CHELSEA

9:35 Hello. I'm gonna break down like a lot of the pricing for you at the end and thing to do is give you options... because sometimes there's things you do need. Sometimes like this is nice. But do I want it now? And so we have customers range anywhere from like four two five tax all the way to 400. So more than likely if there's something you see that you want to know if it could do better, one monthly, yes, I have options for it.

JAMIE

10:06 Okay.

CHELSEA

10:08 Speaking of that though, have you determined a budget of what would work for the company?

JAMIE

10:16 I haven't thought about it.

JAMIE

10:21 Whatever it is. I'm sure we can have that, but... I'm trying to boost, let me do some.

CHELSEA

10:34 Yeah.

JAMIE

10:39 You might know the extra this better than me, but... I want to say less than 10,000 dollars a year, I don't know... is what we want to be under.

JAMIE

10:55 I'm just guesstimating that it.

JAMIE

11:01 So, yeah, I would just say that for now somewhere around there.

CHELSEA

11:06 Yeah.

--- *Pricing ends* ---

CHELSEA

11:09 So with that, it's going to be a little bit more than that especially with the added each integration. God. I will say with service trade, we do have an ROI that we pay for ourselves in the first year because beautiful software shouldn't cost you anything. It should, if it does what it's supposed to do. It's supposed to make you more money and painful... definitely break it down. Curious know besides service trade, who else are you guys evaluating?

JAMIE

11:40 So far we've looked at BuildOps, okay? And we currently use go canvas... and then you, you're at so far. So I don't remember way back when we had whereas and you give us about three or four people before we went with go canvas just because it was simple and pretty much three years ago. Everybody said we're going to integrate with Sage, but we can't right now, but they go to the client. So they're on the cloud now. So less than one where we have valuate.

JCALLIHAM

12:08 Okay.

CHELSEA

12:10 What do you think a BuildOps?

JAMIE

12:12 It was very complex and I felt like I was going to have to hire somebody to manage.

JAMIE

12:23 But I don't know they offer. I don't know what would be like in the real world because, you know, I compared it to go canvas, which is very, the basic... the basic out there... but it was our entry level to this one from PDF on the laptop with a signature pad, the US before we went from that to go canvas. So that was like... like yours for us moving forward, but I also understand that is a... a basic... just a basic app builder that we make it into what we want. So.

CHELSEA

12:53 Yes, I... I did have a guy the other week. He told me that when he self-service trade, but he's like, you know, I feel like I've been Robin to sticks together to make a fire fighter.

JAMIE

13:07 Hello?

CHELSEA

13:09 I think you're gonna really like what you see today like quoting that's such a great opportunity to bring in more revenue. Isn't simple. We track it, the equipment like you're talking about absolutely, you can keep as much or as little information as you'd like and we easily break it down so simple to view.

JAMIE

13:26 Okay.

CHELSEA

13:28 And before I just jump in my last question up that way, I kinda know sort of what timeframe you're looking at. So I know kind of how to work things on my end.

JAMIE

13:38 You don't have, we don't have a timeframe at all right now. We're simply just, we're satisfied with where we're at what we're doing, but we just, we wanted to entertain because like I said three years ago by said they're going to integrate. So we're... we're mainly interested in integration with Sage. That's going to be the deal breaker for us to make a move. If it don't do that. That's we're just gonna stay where we're at.

CHELSEA

14:03 Understood understood. But I will say no matter what, when it comes to accounting, she was... she was always for.

JAMIE

14:12 Yes.

CHELSEA

14:13 So that's why we want to help with that service bar of getting that generated more. So they have more to account. I'm gonna share my screen out with you guys must stop my camera just because my internet is terrible. I'm near chapel hill, North Carolina, yet 80 anti act like I'm in the middle of nowhere... if you all can let me know. Can you see where it says service trade... perfect. And I wanted just to verify. So I just heard back from accounting integration specialist and she wanted to make sure because sometimes when people say Sage, 100, making sure, is it the stage 100 contractor, the old master builder?

17702429812

15:02 Mass mass nine?

CHELSEA

15:06 It's the mass 90.

JAMIE

15:08 Yup. The probably the master builder.

CHELSEA

15:15 Cannot. Okay. Because I'm asking her for sure because she is... she is our Sage expert because she actually used to sell it and the SSO and so she comes over, she can just really speak to Sage language. Alright? I'm gonna wait for her to message me back to be sure because it sounds like there's like two different Sage, 100 versions that are out there. And one is still sort of... of old school when it comes to the way that the data is... but we'll dive into here. So service trade going to give you some background but who we are, so I can get my screen ago. So we were created about 10 years ago specifically for the commercial industrial industry. We do not work with those that do strictly residential work. And that is because our CEO, he saw a really big gap in between how hard you guys work versus what your customers see and understand about what you're doing. So we want to get your logo out in front of them more often and really show why you guys are premier choice to go with.

CHELSEA

16:30 So first off, okay, she just message me back so that's good. She said that. So this would be the Sage 100, the non contractor. We do have a partner that has an integration so we can look at something for that. So she's gonna look into it for us. Okay? Perfect. Got a love like instant communication. So the... the first thing that we do for our customers is we're gonna tackle your agency. We want to be sure that you are able to... to make as much money with your current staff as possible. We are able to do this because the technicians in the field have less administrative burden so they can get to more jobs, won't gathering more Rich detailed information and the office here, really good. Clear view of what is happening right now. Also what's upcoming. This is one of the biggest things when I tell you that we have an ROI that we pay for ourselves and it's because on average, our customers see a 23 point four percent service revenue increase year after year using service trade.

CHELSEA

17:46 Second thing we really focus on is your customers experience with you. We wanna make sure that you're getting more like a digital footprint. So that way they don't just see you guys when you know either a, they have a problem or be you send them... an invoice... an invoice is not the greatest subconscious connection to your company. So we want to be able to give them a different view. This is something that should it's like the customer portal that we have, this would allow your customers to have a more modern experience. Amazon is usually someone that people talk about a lot. But I mean, Amazon is massive but people like a door dash or even domino's pizza. Is they send me notifications? So I'm getting more of my information and that's being expect that nowadays? Would you agree?

JAMIE

18:44 Yes.

JCALLIHAM

18:47 And just to clarify I... that previous screen that you're on that is what the screen that the customer can access and see like what we've sent to their.

JAMIE

19:00 Helping like a customer portal.

CHELSEA

19:05 How, how beneficial with a customer portal be for you guys?

JCALLIHAM

19:11 I think it'll be great for some people. For others they want to check it. But... but I think some of them, some of them would... would be great. You know, I could go back and look at all quotes and all that... that kind of stuff.

CHELSEA

19:25 Yeah. And too, so it's allowing them to your E, they can actually request service online. This is just putting everything together. So then that way like it's gonna reduce sometimes the phone... phone call rodeo what happen? Whereas this, they have their invoices together on it. So it's easy to pay. They've got their deficiencies, so the quota right there... because honestly, it's wouldn't really even Amazon if I like, I don't remember what happened or where's my package. It's a lot more above. I like it just takes away the questions. Do you want to have the truth? There's a question sitting there because it doesn't matter if you guys mean you do a phenomenal job with what you do, but that doesn't really correlate depending on what type of customer service and experience that they get. Lastly. The third biggest thing that we focus on for you guys is when it comes to quoting, any kind of repair opportunity is money sitting on the table. And we have found that sometimes our customers aren't sending quotes when they could because the current process is kind of a pain in the behind. It is very simple for your technicians to get this information. You have real time information from the field to the office. So you can quickly get this quote out to your customer and we put our pictures directly on the quote because people don't usually open attachments... with your quoting that you do. Now, are you sending any pictures?

JAMIE

21:07 Not with the quotes our work orders we get from the field, do have pictures that we get back. So in the opposite... opposite direction, then when they submitted to us and approve the pay to the managers and they approve it. At that point, it closes out... the... the work order and it generates an automatic email to that customer list that we have on file where we adjust the emails that get it. So that's kind of the process now. So it's not live like this. So that is appealing... because I have the problem of may and Jonathan trying to get these pictures from the guys. Will some of the guys don't want to turn your work orders in daily? They like to turn on me an.

CHELSEA

21:49 Own...

JAMIE

21:50 Saturday for the whole week. So I don't get that information told it next week. Basically. So be nice if they, if, when they real time take the pictures and attach it, if I can go view it, whether they turn it in because they want to keep the work order open

in case they go back the next day, I don't have to wait for that job is complete if... if that's the way this works, which is what I'm interpreting that would be beneficial.

CHELSEA

22:16 Absolutely. What's your current timeframe to get a quote sent out to the customer?

JAMIE

22:22 Depending on what it is on the quick small stuff, we usually kick them out same day, like the guys generally end up having to call it in... and we're trying to get it to them within 24 hours basically.

CHELSEA

22:38 Absolutely. Yeah. It's kind of what your ideas are, how you think it might work is exactly that we're making sure that your workflow can work the way it's opposed to and you're not kinda handcuffed by the capabilities of the software.

CHELSEA

22:55 Right. So I have jumped us over to what we call the office view of service trade. This just solely means you logged in through a web browser. So you could see this from wherever you are... when you say job, just think would work order. And so the way that our data, the way that the system setup is you have your job. So this is that whole work order that can combine multiple services and you could have multiple appointments. Because we understand with commercial industrial, sometimes it's gonna take a couple of days to get the job done. And sometimes you're out there performing more than one type of service... the verbiage that she got here. So I'd set up for a quarterly PM, the verbiage and labor import items. I've set up what's called a service template. So this automatically populates each time that the services do. And down below, all of these things are gonna start filling in as the job progressive because you do get that real time information field to office.

JCALLIHAM

24:16 So question on this screen here. So that job number that would be integrated with our work order number in Sage, correct? That's... that's kinda the idea of integrating it, right?

CHELSEA

24:33 Why would you need a quarter within Sage?

JCALLIHAM

24:37 So, right now, that's how we kind of track all of our jobs, we create the work order in Sage. And then any purchases that we do, we create a purchase order that's tied to that work order. And so that's the, you know, that's kind of the integration part that when I think integration that's... that's kind of what I think it's to me, it's kind of double work if I have to go into Sage and create the purchase order or the work order and then come back into service trade and create the work order. And, you know, add a line for the purchase order that have... have already created. So

when I think integration that's kind of where... where my mind goes is that I enter it in one or the other and... and automatically populates here or in the, you know, the other software.

CHELSEA

25:26 Yeah. So with us, we're gonna, sorry, Kara, go ahead.

CHELSEA

25:36 Kara, where are you talking? Or did my computer just echo myself back to me?

JAMIE

25:44 They could.

JCALLIHAM

25:45 Launch and she on mute maybe.

JAMIE

25:47 She might have muted the nature of the phone call or?

CHELSEA

25:50 Okay. No worries. So, yeah. So you're actually not going to have there. We go there's. Her phone coming back... with her, she hops in. Hey, Kara, can you hear us?

17702429812

26:08 Yeah. Sorry, I hit the wrong button. I went that I've been meeting myself. I meant to hit on view and I heard Jonathan ask him a question about the job number or then, okay. So... did y'all, answer that question? Jamie or Jonathan?

JAMIE

26:26 Not yet.

CHELSEA

26:28 No. So you, you're not gonna need a work order within Sage anymore because we're going to maintain all of like the customer record all of your PMS, the scheduling, we do the work orders quoting and you're going to even send invoicing, which we do suggest out of service trade. And then you integrate with that integration, you have that information sent into Sage?

17702429812

26:53 Yeah, but how does that track our job costs? Because so we create a work order and then we create the same, essentially the same number as a job. And so it can track like each service. So we know like what we're making off like our profit and stuff per job.

CHELSEA

27:14 Absolutely. We do a lot of that for you because we would have your items, your costs and your markup rules put into the system for you. And then that way you can see like what your gross margins are and then like what your cost versus like the actual... a lot of that finance information that's going to be here. Can we'll go into Sage? So if you're running reports and Sage, you're still going to be able to do the same exact thing?

17702429812

27:41 Yeah, man. I'm confused because like when we get a vendor invoice, we target straight to the job like in Sage, like entering it through P. Oversee. So there's job in there. Where do we put it?

CHELSEA

27:59 That is a phenomenal question that I am writing down. And Tanya, she's my, she's the accounting guru, Sage expert. So I will put that down as one of the questions for her to answer because I, I'm sure if I explain it... it, it's going to sound a lot more confusing.

JAMIE

28:17 Mean, the only way I see it working. So this is just gonna be for labor and expenses in the field Kara. And then we keep materials... purchased by unit template P owes manually entered on the back end. I don't know that that's gonna ever see service trade... without making a big redundant... that. Yeah, that, and we're going to have... to have when putting the data in Sage and in here at the same time. So it pulls up. I don't know how that would work. So when we pull it over from service trade is going to duplicate it.

CHELSEA

29:03 Yeah, I'll... I'll write this down. I'll even pick up the source of it of the meeting to get over to Tanya. And that way she knows your questions about it. So she'll be able to answer it for you when it comes time to that page because she's looking into right now and I'll set up a meeting with her.

JAMIE

29:17 Yeah. Yeah. That's... that's where I sit in issue with invoicing though because that's why we don't want the text invoicing in the field for sure. Yeah, it's because they don't... they don't know the freight costs and the data entry calls for entering the power Steven sell up to the customer. They don't have any clue with.

CHELSEA

29:37 Gotcha. Okay. Yeah, it'll be easier, see once I make a quote, but you keep track of your costing on here. So you'd have your costs and then you'd see what you're charging the customer and we'll show you your gross margins as well per quote and per invoice.

JCALLIHAM

29:57 Hi.

CHELSEA

29:59 See on the work order itself, you rarely see if you have a different Bill to ship to. So that parent child relationship, I will tell you, I'm not that's the technology. So they should make you feel great that I can well the service trade. So you can too. No, the other one was a bit overwhelming. It's like digital storage containers. You can see where to go for what is looking for. So when you need a safe about your customers, you can either job straight into like the address location specifically or the company is the parent. When you're on the parent page, the locations, I only have one set up right now, but you'd have them all listed below. So you can see which one's your service for them. And then it gets a lot more detailed when you get to that location page. So here is everything you know about this location. The services... the services have you agreed to provide? This is where you make that template one time and it's automatically gonna populate for you. Then on out, you set up whatever timeframe this needs to get done. And then we automatically take over and can tell you when it's do again.

CHELSEA

31:22 Job.

JAMIE

31:23 It would be beneficial.

JCALLIHAM

31:24 That would be beneficial in the PM. So.

CHELSEA

31:28 How are you currently tracking that scheduling now? Excel? Okay. You're yeah, you're gonna, when I show you next, after this page, I believe... when a customer calls in to the office and they have a question, you know, about a job that's just a, per, what is your process? A little up that information?

JAMIE

31:56 Reference the work order number, and I can search through go canvas with that, pull up the work order or I can just put the customer name in and go in, you know, sort it by... by date.

JAMIE

32:12 Okay.

CHELSEA

32:13 Yeah, similar refund the location page. And then it's going to be a little jobs all listed in order of the date. You'd also be able to see more details. So what you would know what to click into... and what you're talking about when it comes to equipment, we call them assets. And you can keep a lot or a little totally up to you. But something

that is really advanced for us is the fact that you can actually keep a history in the visual for each piece of equipment. And what I mean by that is let's say, so I know your refrigeration by just click on this H back unit. You can see all of the jobs perform just on this unit. You can clearly see all deficiencies. So all the problems this unit has had that way when it comes time to having to recommend being more expensive, repair or replacement, you can get to that very fast and clear instead of having to look back through like a whole list of work orders to see which one, which unit had what issue.

CHELSEA

33:27 And then everything else you know about them. So whatever contracts you have, if you've got special comments. So these are technician notes. So your guys could see these in the field. It's letting them know they need to talk to Bob. And here's a door code, the office, you can also keep track of any kind, have scheduling and, or billing note... and your technicians will not see those notes because they have no purpose to... and anything else that you want to keep track of. So if you have a building blueprint, any kind of schematic, you can have that uploaded here. And I do wanna mentioned if you have like a equipment specific manuals or different pictures about equipment, you can actually attach attachments to each piece of equipment as well.

JCALLIHAM

34:18 One quick question about equipment. Like Jeremy said, he's got several companies that he does have an excel sheet with equipment listed out. Is there a way to, you know, if... if we were to go with this when it gets created to have those list of assets already uploaded into like our... our customer list?

CHELSEA

34:37 Yes. As long as, yeah, there's a way to have it, you export in the spreadsheet where it, as long as there's the ability to clearly tell what customer it's attached to, then, yes, if it's...

JCALLIHAM

34:48 To upload template... okay?

CHELSEA

34:51 And actually for you guys... you would be able to have that just like the equipment like make model serial number. That would actually be something that's included in the tier for you guys. And then what else that we always do is any of your customers, names, all of their locations, your items, your costs and your markup rules. We automatically will put that into the system for you. If any of the data isn't clean, we do what we can to clean it. And then we'd work with you guys because it's very much a partnership. You have a support person assigned to you the entire implementation period and they do weekly check in calls.

CHELSEA

35:35 But let's look at scheduling. So use that each location, you know, the services, you don't have to go through each page, see what's do you just ask service trade okay for my jobs? What opportunities we have to provide service? Now, you just tell the

system what timeframe are you looking for. So if you want to schedule all PMS for next month, click search, they're all of your opportunities. And we have listed if maybe you have multiple types of services and that same time frame will make sure you're aware. So you don't waste any Winchell time... also have the ability to certain types of services or locations. And now when we click this button, you can create your work order and you can go ahead and get it scheduled, which there are several ways also to do the scheduling. Do you happen to have maybe some technicians that they have, certain locations they always go to... like the... the preferred person to send?

JAMIE

36:53 Yeah, yeah, yeah. But basically artists are scattered all over like in a circle around the city of Atlanta. So we try to keep them the customers that are closest to their house... that's the primary.

CHELSEA

37:08 Perfect. So you can set them up with what's called a preferred technician. So, you know, hey, this location, I always want to send that text too. So it would then go into the unscheduled. You already have a text that you want to put on it. You just haven't given it a time yet. So that would be these gray bubbles. So as you can see our walls is up here. Let's go ahead and add, have to forgive me. There we go. You'd add Wallace here and let go. And then that would make that bubble brown. I just don't wanna mess this up because everyone uses the same account for demos. I get the entire US and Canada that's why my map looks this way. Yours would be zoomed in better for where you're actually working. And that is not the only view you can have. Show you the other two as well.

CHELSEA

38:07 The dashboard is the screen that you'd actually see when you first log in it as kind of like a 30,000 foot view of what's happening. So, you see today's schedule, we're actually going to give you visuals of the statuses. A check mark means the text done that services done, you'll have others to let you know if the text is in route and when they're on site... and I checks and balance system to ensure no job falls through the cracks. So those over do coming up in the next two weeks all the way down to the jobs that have been completed that you are now ready to invoice.

CHELSEA

38:53 How often do you get emergency calls?

JAMIE

38:57 But every five minutes... now we get a, we get a pretty regular, okay.

JCALLIHAM

39:05 Or a.

JAMIE

39:05 Couple of days?

CHELSEA

39:07 Can you kind of walk me through the process of like what happens when you get the call? How do you get the check out there?

JAMIE

39:13 So, Joe.

JCALLIHAM

39:15 Call my...

JAMIE

39:15 Cell phone first, and then I'll just call takes until then we'll go ahead and then me and Jonathan get together on the back end and create work orders for billing or put it on the calendar and dispatching and go canvas. So when they get there, they had, they can fill out work orders and get signatures and all that. No, that's the dispatching process right there and setup that we have to go through.

CHELSEA

39:42 Right. And another question, do you... may have most people? Do... do you have any customers that you maybe have, they owe you money? The kind of on hold... on hold status? Are you having to deal with that at all?

JAMIE

39:57 A little bit... but typically that's just a, an accounting reporting thing?

CHELSEA

40:07 Okay. Does it affect you all with the like... the like the calls? Do you know, have the technicians pick up money on site to you?

JAMIE

40:18 No, that's all. We all, everybody pays by check or AC, H through corporate facilities to.

CHELSEA

40:26 Okay. With our dispatch board, this is going to give you a complete right now view. So your red line will move in real time for you to see who's on what job... so that you have the different locations with the guys are at. So you see, I have pain services. And then here's calling, you could actually set up different offices to know who's in what location... and when you have someone called in. So we'll say we get an emergency call from public's I'm gonna pick the correct one. This is where I was just showing that. Hey, if they did or money, it could show you but you can still send out the technician, but we'll say that, you know, there's a problem, please help you, just tell your customer. I'll get some out there as soon as possible today and hang up or you can give it a time. You could give it a day. But the fastest thing is this.

CHELSEA

41:31 You have the job now in the system. And instead of calling the technician, you can see, hey, who's available? And then you just take it to their swimmer. Lame. I am now updated that my schedule has changed. I can see what you said that the customers complaint was what you're telling me to do and the full location information.

CHELSEA

42:01 Potentially a little bit smoother rubber process for you there. Well?

JAMIE

42:10 I mean, it's... it's basically the same. We have this calendar and go canvas to, we don't use it. We use our outlook and stayed for the calendar for when we share it with the taxes will... input notes in it. We do that for the look for not having to do it redundant lead. It's kind of a double entry.

JAMIE

42:33 Some of that may be intimidation on my end from just having to change, but because I've done it the other way for so long. Yeah. But I like... I just thought lot of times I'm doing this stuff driving through Atlanta with Monday on the wheel and.

CHELSEA

42:49 The more so on a.

JAMIE

42:49 Phone call and trying to do it. So less entry, I gotta make that.

CHELSEA

42:54 Yeah.

JAMIE

42:58 So, I don't know. I liked these this.

JCALLIHAM

43:03 Calendars like.

JAMIE

43:04 This, but it's almost like you gotta have somebody dedicated, just a manager.

CHELSEA

43:11 Hi, potentially and something that we have that especially if mercy, you're driving around trying to type stuff and you could just call your technician and then

JAMIE

43:27 Okay.

CHELSEA

43:28 I'll show that to you. Alright. So now you've kind of seen kind of seeing how everything is set up in the system. So now let's show you how the communication works back and forth. So this is the technicians point of view. They can use either in like a tablet or their phone. It is honestly personal preference and we are apple and android friendly. You see the job that I had scheduled. And then here is that service call we just put in. So the technicians when they are ready for the job and click clock in at the bottom. We also have the potential if they want to keep track of like in route time and job prep time, they can do that to... their view is very simple because we want them to visually be able to see where to go for what information they need quickly... services is just exactly that, what are they there to do today? If I need that door code, I see the location comments, I know who to call if I need to speak to someone. And I can also see all of that equipment information. So if I need to know like, hey, what happened the last time I can see the full service history and specifically all of the issues that this color has had.

CHELSEA

45:00 Four locations that you do not have equipment information for. It is pretty darn fast and simple for the text that added in because they get the push buttons. So they can click add asset. They would go to the asset type. So to say walk in... it will be customized to the types of services and equipment that to work on. And they can go ahead and type in some of this information or two. They could also take a picture and then someone else to type it in later, what it is good to have it separated. So, you know, the actual work history for each piece of equipment.

CHELSEA

45:45 So let's show you what, how you're quoting process can change when they're out here working. They don't have to worry about calling you because they found an issue. They're gonna come right here to deficiencies. They can say, maybe that is leaking. They don't have to put it in a lot because now this is where they're going to show you. They're going to show the customer what's wrong. They can add a bucco of different picture. If you are not limited on the data... they're going to let you know how bad is it? They will confirm which piece of equipment they're working on... and then market as new. And then they continue on about their job for this PM. So we just put that into the system. And now you're gonna get a notification. So we have tie the deficiency to the job. It was found on. It's. Tied to the piece of equipment and the location. But you get an email notification and this is what you'd see how bad is it? Where, who found it? All the information you need to make a quote?

CHELSEA

47:11 We already have our...

JAMIE

47:12 Ready.

JCALLIHAM

47:14 Or...

CHELSEA

47:15 Anything that you quote, often make a quote template. So you can see on here, you can have a ton of different quotes. All you have to do is just give it a name... you type in whatever description you'd like you can add in that again, those parts and labor. So when you click your button, it is on your quote... but let's say there's something unique about this one. You can click your pencil and change any of the verbiage you need to. You can also come down here and click your pencil. If there's anything about the parts that you need... you can see your gross margins. Of course, your customers don't see... what kind of level of detail do you get to your customers? Are you given like summary is you do a grand total only?

JCALLIHAM

48:15 For the small?

JAMIE

48:16 Jobs, we... we keep it pretty general. Probably three two four seven. It's sco, detail, just kind of the general, what we're doing... and then list out. We break it down by labor and travel and parts, and any sub contractors with electricians, or whatever evolve rental equipment, stuff like that. We break that down for them... and then have our total price and then all the more complex stuff. I mean, it just depends I make copy and paste equipment specs. It's eight pages long to a clue.

CHELSEA

48:56 Okay. Yeah. You get to decide, hello quote, how you want to send that detail. Now. I'm actually going to send this quote to all of you because I don't think you're in the same location. So if you guys do not mind if you will go into your email or at least someone can I'm gonna open the call on my side, but I want you to view more customer would see.

CHELSEA

50:01 Alright.

JCALLIHAM

50:01 So it came through on my end. I'm looking at it now. I mean, I think it's got the necessary information in there. L... are there any restrictions on how you can change your template the way it looks, that sort of thing? Is that something you do during implementation or?

CHELSEA

50:23 What kind of things would you like to change?

JCALLIHAM

50:27 Just like if... if we want to add in, you know, just, you know, make certain part boat, make certain parts, you know, bigger.

JAMIE

50:36 Just, you know.

JCALLIHAM

50:37 A static type things.

JAMIE

50:39 Formatting, right?

CHELSEA

50:43 Yeah. So all of this stuff right here, that is all completely however you wanted to type it in like making it bold because a lot of mind don't have it to where it's like this is massive bold letters. We will customize it with having your logo up top. And then it's also customize for the terms and conditions, you have your company's added there unless you don't want them, but I would suggest to have them... if you don't mind, will you do the process of approving that quote for me? Cause so you can see that?

CHELSEA

51:34 Besides possibly wanting to change, you know, how some of the verbiage looks, what are your overall thoughts on a quote like this?

JAMIE

51:46 I get, I was just thinking of a process. So now I use an excel sheet that I enter all the data to come up with our numbers and keep a part number. So it's like I, my quote something not doing the job for a couple of weeks or months later. So I keep all that information in excel, file, the details to order it. And then we have a word document. We pop up this portion. So instead of typing up the word, we would do the entry here and just say the excel files in the quote from quotes we get on stuff. People are still. So I think I could see how that would work, just be a process change of entering it here instead of in we're basically.

CHELSEA

52:31 Yeah. Just making sure lessons people have a lot of skater... skater scattered data. And so we find, you know, being able to have it altogether in one place, not only the time saver for you but it just has a lot of different benefits present. The more you have a one place to easier to share to the customer and keeping track of everything.

JAMIE

52:57 Okay.

CHELSEA

52:59 Once your customers make a decision on the quote, you can see that your quote status has changed again, you can get set up to make you get a notification for it. But now let's say you wanna make a brand new work order, you just click this first button. Everything transposes over. So you don't have to retype anything or the circumstances like you were saying, you know, the guys are still out there or maybe they go back tomorrow, just go ahead and add this to repair to that work order. Now, my absolute personal favorite thing about service trade besides it's organization is a lot of it's digital history because this is a see why aspect for... you... you can see all communications for this quote starting from when your technician found the issue. You see who emailed it to and when keeping track of who's viewed the quote. And then that way to, at the end, you can know who has approved it. So for this purpose, I have a law enforcement background and when it comes to your customers doing the quote, it just kinda great to help keep everybody honest. So that way in case let's say something's wrong, they don't wanna fix it because they don't want to pay for it. So they're gonna ignore it was, you know, if equipment has a problem, it's just gonna get works. So next time they call yet, that might be a more expensive quote. And we've had customers that, you know, their customers. Like I didn't know about this, how you can't charge me more money? Well, yeah, I mean, you've... you've quote?

CHELSEA

54:47 You guys ever had to run into anything similar to that?

JAMIE

54:50 Yeah.

CHELSEA

54:54 Are you tracking? But...

JAMIE

54:55 It's... just bad dates on the files and then we email them out in PDF form. So the only other regular would have thought that would be chatting a bit of outlook? Okay?

CHELSEA

55:10 With our quotes tab, we're going to track all the quotes for you... you, see that you get to filter whatever you're looking for. But right now, I have mine filter to show you quotes that you sent to your customer. They viewed it. But they didn't make a decision. So we're gonna bulk send these puppies back out, get on top of their inbox again.

--- *Pricing* ---

CHELSEA

55:39 When it comes to like the revenue increase, especially when it comes to quotes... we have found if you put four, two five pictures on a quote, you can increase your quote approval rating 30 to 42 percent. But then if you can get you a quote out in front of the customer several times, you can increase it by an additional 10 percent.

CHELSEA

56:06 Do you see how that would benefit some of our other customers?

CHELSEA

56:14 Well, I guess I should ask them, do you agree?

JAMIE

56:17 I don't know. I'm just trying to how we get in front of them over and over just emails for generating these. Like we just got a minute ago.

CHELSEA

56:27 For the customer.

JAMIE

56:28 You said forget it for them four times or something like that. We increase the percentage. So how is that? How is this getting in front of them more?

CHELSEA

56:35 Yep. So when you click this button here, you can then set it so you can either send them all to the customer or you can send them individually. But it just says the same thing. Emails that.

JCALLIHAM

56:44 Cool. Right?

CHELSEA

56:44 Back out in front of them again... because like I'm terrible at getting a text message or like looking at email especially for my kids features at school. And I'll look at it, but I get busy and I forget to respond to it. So same thing. We wanna make sure that they're like, hello, you haven't answered this. Look at this again. Okay. Alright. No, I know I'm coming up on your guys this time. So I'm going to just kinda fly through the rest of the technicians side because I would like you to see what the end result like for invoicing. And then two, if you like what you have seen today, then we can always cover more next time. So attachments, this just gives, again, if let's say you guys have a receipt or your guys seem to do before and after photos, they can do recordings for your text or for your customers and you. And if you guys like to get signatures, we think it can be great. So that person just says, yeah, Chelsea was here, they'll sign a copy, their signatures, email to them a copy a saved for you. And now your technician can clock out before I do that, any questions on the text side?

JAMIE

58:09 On the clock in clock out thing? Is there a way to bed?

JCALLIHAM

58:12 Man.

CHELSEA

58:16 And what kind of use case?

JAMIE

58:18 That we just put the number of our slack. So like our travel time for our guys, they're... they're actual drop times different than what we pay him. Yeah.

CHELSEA

58:29 Yeah... yeah. It's just for you to see and kind of have that visibility but you get to charge labor and pay your tax as well.

--- Pricing ends ---

CHELSEA

58:39 However you do it internally. Okay. Gonna sign out. I will say too if you have any kind of internal checklist or maybe customer specific list, we can actually upload all those forms for you into the system. So the text have a syllable PDF, but it is smart. So anything you already know, so is date location and equipment info that will pre-fill for them. Okay? Your job analysis completed, that used to say scheduled, you have a check mark, you see the status update on multiple pages. But now here in the office, you're ready to invoice. If you have different contract pricing, you can add the correct contract for the markup rules. If you have special billing comments, you are reminded.

CHELSEA

59:35 And now here's your invoice. So we're going to go ahead and send this off.

CHELSEA

59:49 Alright. So you can see invoice has been sent. If the customer, let's say they decide they want to mail in a check. Totally cool. You can add that in. And now it's gonna change to, hey... this is what your customer is gonna see as an invoice. We keep it pretty basic because the purpose of an invoice is for you to get paid. We have a pay now functionality which has helped our customers pull an outstanding 15 to 20 days because as soon as they get the invoice, they can pay you either via credit card and, or AC. H. But it is a merchant account. So your money goes to you, not us. And you can also set up your own rules meaning if you do not want to take any type of credit card payment, you do not have to and that won't show up.

CHELSEA

1:00:46 And then once the customer, you know they see the invoice, this is generally where they're lasting impression has stopped. We give them what's called a service details. So they go from a look how much money I owe them to look what all they did for me today... Chelsea out, this is what she was working on today... any of the files and picture. So a signature on site before and after photos. If you have like that refrigerant tracking, you can have that listed here for them to and alerts. So the

whole big picture of the visit protect found a problem while they were there. So if they haven't seen a quote in their inbox, they should go check now.

CHELSEA

1:01:38 Right. So, I know I'm at your guys this time. So I apologize about that. Does anyone have a hard stop that you need to jump off right now or do you have like two minutes?

JAMIE

1:01:48 Okay.

CHELSEA

1:01:50 Okay. Okay. So the first thing I want to ask you guys is from what you saw today, do you feel like service trade could be a fit for your company?

JAMIE

1:02:03 Mean, it's doable... from what we're doing. Now, it looks like a lot of data entry. So what am I? One of my biggest concerns on the application or implementing of it? Is the guys doing the data entry in the field, like actually doing so that's... that's one half of my guys probably do found with the other half. So what kind of feedback have you got from other contractors? Would that dilemma? Definitely, it was successful after the fact or?

CHELSEA

1:02:40 Yeah. So I've had some. So I don't know. So Virginia sprinkler company, I don't know if you know of them pretty big. Okay. We had a company meeting a couple of weeks ago and he actually came and spoke with us. He's been one of our like longest customers because generally pretty good. We're made for life and fire safety industry. But then we realized just as important as your inspections, you have to keep up with your PMS and you have some sort of like workflow. So he came to us and he told us that he was also concerned about especially as older technicians learning the platform actually using that, there is a little bit of a learning curve, but we provide training which is incredibly simple. He has spoken to some of them. And so especially some of the older guys told him like look, I was worried at first getting onto the platform and doing things differently. But if you ever took this away and we were to go backwards, I would leave.

JAMIE

1:03:40 Yeah, that was kind of our experience with the go canvas to when we went digital that the guys kinda booked at first but once they figured it out there like, yeah, this is very simple. We can do it on our own, no user and get it out of the truck... all that good stuff. So, yeah... the whole integration thing, I don't know with that. We're just nobody's ever been over, just show us what that looks like from one to the other. So.

CHELSEA

1:04:11 Yeah, absolutely. So I'm pulling up so I can ask her when would be a good time that she could be able to meet with all of us Monday at? What would you say would be the, your favorite thing of what you saw today with service trade?

JAMIE

1:04:28 I mean, I like the customer portal that they have the access to it. I think that will eliminate some phone calling back and forth with us... and we have them to stop on side of the road an E mail stuff. It would just be, I check your portal. Once I get those customers trained on that, it's just it's already integrated bang for sort of cut down on the get a call that results in three phone calls.

CHELSEA

1:04:54 Just...

JAMIE

1:04:55 Be handled it on their leisure and Malaysia, that's probably my favorite part of.

JCALLIHAM

1:05:01 Yeah, I'd say for me how like it saves the quotes under the equipment right now. You know, we send off quote request a lot of times on the... the same type of equipment needs. So I could share, say alone, you know, blah blah blah, we can go to that equipment and see if we've ordered a chef feel for it before and then just pull that... that quote that part number off of that specific quote. Save us some time because a lot of times we're waiting, you know, up to 24 48 hours just to get a quote back so we can quote it out.

CHELSEA

1:05:35 Absolutely. I'm Kara.

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1:05:40 And really, it's these guys know if that works better for them. Basically obviously Sage. And then the payroll and job cost is the biggest part for accounting side.

CHELSEA

1:05:53 Absolutely. So you have written down because we, I wanna next meeting, I want to get to show you guys the portal on exactly how they see it, how they communicate and then how you see that communication, the office. And then also too when it comes to time tracking and payroll for your technicians, we have something that's just come out or we actually revamped it's. Called the service straight time card and it allows for all the clock events that are in the system. It's put over to it. You can see anything special that you want to keep track of. So company meetings, pto, all of those things as well, the technicians, but have them the ability look at... what their... what their time looks like before submitting it. And then you get to look at, it... it has super duper, easy hyperlinks to wherever, you know, like why are you on the job for so long? Click the link takes you directly to the work order.

CHELSEA

1:06:50 Yeah. So Tanya said that I asked her if we could set up a meeting for next week. It looks like she doesn't have any availability on Monday and I'm kinda slammed on Tuesday, Wednesday or Thursday. What would work for you guys?

CHELSEA

1:07:13 And you are remind me of your time zone again, please. I apologize.

JAMIE

1:07:17 Easter.

CHELSEA

1:07:20 Yep. Sorry. Yeah. So dealing with company that was in Mountain Time early, where am hi? So it looks like on Wednesday, I've got 10 AM is open and 11 or I could do later in the day that's easiest. And on Thursday, I've got 11 30.

JAMIE

1:07:47 I won't say the 10 o'clock Wednesday for me.

--- Small Talk ends ---

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1:07:52 Either is fine for me.

JCALLIHAM

1:07:56 Jeremy is my boss. I'm open whenever he tells me.

JAMIE

1:07:58 That's true.

CHELSEA

1:08:02 Man... you understand the... the assignment?

JCALLIHAM

1:08:09 Hello?

JAMIE

1:08:11 Hello, really. I see a lot of work in your future jobs... and look through this.

CHELSEA

1:08:20 Hey, it's a partnership though. So you always have service right with you. So I will say you do have a support person there with your entire implementation. Once you're done, you're assigned an account manager, and we all like 98 percent of us live around the Raleigh chapel hill area. So we have a fast response time. Yeah. Well, guys. Thank you so much for meeting with me today.

--- Wrap-up ---

CHELSEA

1:08:41 I'm going to send you a recap email later today. I will put this meeting on it because it is recorded and then I will send you a calendar invite for next week. We'll cover the... the portal, the time tracking and meet with Tonya to go over the Sage integration. If anything else pops up that you find might be helpful to go over, please feel free to email me.

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1:09:04 Okay. Alright.

CHELSEA

1:09:06 Awesome. Thank you. Thank you so much. Have a good day.

JAMIE

1:09:09 Right. See you.

CHELSEA

1:09:11 Bye.

The End