



ServiceTrade Demo with Stonewolf Contracting Inc.

Brett Griffith with Stonewolf Contracting Inc.
Recorded on 11/14/22 via Zoom, 1 hour 32 min.

Participants

SERVICETRADE

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OTHER

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Transcript

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

BRETT

0:00 Hi.

KURT

0:00 Kurt. Hey, Brett... we go again.

BRETT

0:04 Alright. I don't know how to pronounce the states.

KURT

0:08 Yeah.

KURT

0:13 Try it was a D.

BRETT

0:18 I'm just going to be like, hey, man. I don't want to Butcher it. Let me know what works with you.

BRETT

0:29 They read up on the... build ups, battle cards. I don't know a lot about BuildOps by heart though, which makes it a little tougher.

KURT

0:40 Yeah, no order line. I rarely run up against them.

BRETT

0:48 When I run up against them, it's like we were evaluating service trade. And then we didn't want to go with the first one. So, we looked at BuildOps and they come in like last minute and just drop their pants down and give them whatever discount they want.

KURT

1:02 Right.

BRETT

1:04 I usually just one price. It's not product that I was on... a... PDF or is that one the only one at one?

BRETT

1:27 Do we think can show up the question?

BRETT

2:18 Susan has in our notes that Eugene is the owner, maybe that's how you say his name?

BRETT

2:32 Air it is Eugene.

KURT

2:35 Yep. Yep.

BRETT

2:37 Alright.

BRETT

3:22 Hey, good afternoon, Eugene. Can you hear me?

EUGENE

3:24 Yes, I can hear you. Sorry, I just got off another meeting. Took me a minute or two to dial an...

BRETT

3:29 No, you're good. My friend. Thanks for joining. My. Name is Brett Griffith on the inside territory manager here at service trade for the northeast. I've also got my field rep on the phone. His name's Kurt dot Meyer.

KURT

3:38 Hey, Eugene.

EUGENE

3:39 Hey, how are you?

BRETT

3:42 So, but like I said, thanks for joining us. Is it just gonna be you on the call today? Yes. Okay, cool. And are you the owner or the CEO or?

EUGENE

3:52 I, the guy at the very top.

BRETT

3:56 Got like, okay, cool. So, Eugene to really give you an idea how we like to run these things. Typically, what we do is we start off with some questions. I want to know more about Stonewolf contracting and who you guys are, what you guys are working with today and what your goals are for the future. From there, I'll give you a little bit of background on service trade itself. And then we'll go ahead and jump into the demo. So you can actually see what we have to offer. Does that work?

EUGENE

4:23 Yes, sorry, give me one second. Yeah, I'm doing refrigeration check sheets for a medical facility that's under fda audit. So I'm going to be a little slow on this meeting. Please bear with me if the hansard trips, you're gonna have to give me a second. Okay?

--- Type of work ---

BRETT

4:40 That's understandable. I know you're running a business.

EUGENE

4:44 So basically we're a commercial industrial HV, HCR mechanical company and we have to, we have to funnels, we have our New York office which takes care of New York, New Jersey, small part of Connecticut. And then we may potentially expand into Pennsylvania.

--- Type of work ends ---

EUGENE

5:03 Have any haven't really looked at that yet? But it's on... you know, it's being spoken about. We also just expand that into the Florida market. That being said, we're going to have a silo for New York, the New York office in the Florida office. Sorry.

BRETT

5:25 Okay. And.

EUGENE

5:27 Starting to keep a, you know, one one company, one log in, but then I have two different silos, and kind of differentiate a little bit.

--- Forms ---

EUGENE

5:35 What's also important for us is a second, what's also important for us is custom... to him. Okay? One second, guys, sorry, let me close out team viewer also because it's in the way of this meeting. What's also important is custom forms. So, right now, I'm killing an absolute crazy amount of time on these maintenance check sheets where I'm converting from hand written forums into PDF to send to our... partner on this. That being said, obviously as you can imagine that it's taken up a lot of my time.

--- Accounting integrations ---

BRETT

6:21 So does that?

EUGENE

6:22 Mean.

BRETT

6:23 Percent on paper tickets today?

EUGENE

6:26 No, we're actually, we're running Davis where?

BRETT

6:30 Gotcha.

EUGENE

6:31 Yeah, we're running Davis. Where am I spoke to you guys years ago? And then I went with Davis where at the time, you just guys, you guys just didn't have the... features that I needed. The Davis were had, but now Davis, where the software that I have, this is ridiculous. They outdated.

--- Accounting integrations ends ---

BRETT

6:52 Okay.

EUGENE

6:52 And actually, I signed up for BuildOps last week, but I got, you know, veterans' day, I got a phone call. I haven't paid them yet. So that's why, you know, we're kind of... we're kind of looking into this because I haven't paid him yet. What's the worst it's going to have. But I'm going to be in breach of contract and I'm gonna work with me who no, not really scared of it? Assuming you guys have the better product? Okay?

BRETT

7:21 Yeah, that's kind of my understanding of why we're here today, carry out of curiosity, what made you go with BuildOps in the first place?

--- Accounting integrations ---

EUGENE

7:29 No. What I got a phone call from one of their sales representatives. I was looking at other companies to I'm very unhappy with Davis where their software is very dated. A lot of the platforms that they're operating on are, have been end of life. And they originally told me that there are two point platform. They're gonna upgrade me at no cost and it would cost the same amount of money every month as we did. And we continue being locally hosted, which we are now... then, you know, problems with Tom. This is promises... and now we get to it... now we get to it and they're telling me I have to switch the cloud which I'm not against at this point.

BRETT

8:13 Hi, Dave is where the cloud version? Is it called vision?

EUGENE

8:17 I'm using locally hosted vision right now?

BRETT

8:19 Gotcha. Okay.

EUGENE

8:25 Second, I'm using the locally hosted version, we have a 42 unit brac server in the office. I have my own cloud. I have my own file server, active directory, et cetera, looking to simplify all of that just because it's becoming kind of a pain in the ass to operate all of it. So, you know, looking to get away with that. So I'm not against the cloud and where everything is going for small and medium business, there's no reason to reinvent the wheel. But I'm just really upset with Davis where they're softwares all this complicated. And now they want three three or four times the cost plus is going to be cloud. So, you know, cloud software, which isn't horrible. It's just, they lied already. So why would I trust them going forward?

BRETT

9:09 Yeah. I think your alone on that. I, Kurt and I recently dealt with another company that came off Davis square, and they pretty much told that company the same exact thing.

--- Accounting integrations ends ---

BRETT

9:17 They were based in New York as well. And that company that I'm speaking of recently moved from Davis where to service trade. So I want you to know we've taking people off that brought them to service trade before.

EUGENE

9:28 Down to the mechanical by any chance.

BRETT

9:30 They know they were fire, but they had a similar situation where they have an office in New York, in an office in Florida.

--- *Type of work* ---

EUGENE

9:37 Gosh, donnelley, mechanical local. So that's really it. So I looked at BuildOps BuildOps aside from having a customer portal, literally hate everything else on the head of what I need and what I'm looking for.

BRETT

9:53 Okay. I have a question. Are you guys doing a lot of Installation, new Construction work?

EUGENE

10:02 No, we're mostly service and repair.

BRETT

10:05 Okay.

EUGENE

10:07 I mean, we do have an install department of course, but we're mostly service and repair.

BRETT

10:12 Okay. Do you guys do like maintenance programs, preventative maintenance?

EUGENE

10:16 Yes.

BRETT

10:18 Do you in Davis where I think there's a decent way to track that in Davis where, and I imagine you're looking for a new solution for that?

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

EUGENE

10:26 It's absolute garbage. Okay? And David squares if you want to know honestly is absolute trash inside. The more I see the more I see other solutions, the worst day,

this is where it gets in my eyes. And the farther down that they felt.

BRETT

10:46 Okay. I gotcha. I can definitely handle you there. I think service trade one of the best on the market as far as.

EUGENE

10:55 What I'm sorry, you broke up.

BRETT

10:56 As far as tracking recurrent services, I think service trade is one of the best on the market and especially for your industry commercial and industrial, that's all we work with them. I'm not working with any residential contractors and we're only working with skilled contractors. So our main two markets are the mechanical MVP and fire life safety markets. But I think you'll see that as we go throughout the demo today, I do want to ask a couple of other things. It sounds like you're pretty much there as far as wanting to make a decision. So if I do show you everything you wanna see today, what's it look like for you?

--- Purchase decision ---

EUGENE

11:31 I talked to the incas dry with BuildOps. I just haven't paid them yet. So let's see what you have now, right? I mean, I wanted deployed by January. Give me one sec. Pretty.

EUGENE

11:50 January third, I want to be live, how's that sound?

BRETT

11:55 Okay. We can work with it, but we are definitely running low on time. So let's go ahead and show you the demo and see what you saw today.

--- Purchase decision ends ---

EUGENE

12:02 That's what I'm saying, you know, I was gonna, I was gonna pay BuildOps. I'm going to build up this week. And then I got a phone call from a lovely lady on Friday telling me about you guys and I remember speaking to years ago, not you specifically for your company. Let's see what you guys got.

BRETT

12:18 Absolutely. All right. Let me go ahead, share my screen. Let's jump in.

EUGENE

12:24 Right?

BRETT

12:26 Can you see my mouse moving around my screen? Cool. So I've got some slides for you. I promise I won't bore you there. Just introduction to service trade. But we are a service management program designed specifically for commercial mechanical contractors. Like I was saying, as of today, we've got about a 1,000 customers in the states and in Canada live using service trade every single day. And companies come to us with anywhere from three trucks on the road all the way up to 300 trucks on the road. So, meaning they come to us to help them grow and scale their business. And Eugene, what growth goals to be good?

EUGENE

12:58 The question, quick question. Before we go forward, what hosting platform do you guys run on?

BRETT

13:04 The last?

EUGENE

13:06 Okay. Fine. No more questions there.

BRETT

13:10 Cool. But yeah, if companies are coming to us to help them grow and scale their business, which leads me here into my mission statement, which is to help commercial service contractors be more valuable to their customers. And at the end of the day grow their business. That being said, Eugene, do you have growth goals for Stonewolf?

EUGENE

13:28 Business owner? Does we went from 35 mechanics on the road during COVID, we're down to... six or seven service mechanics. Okay? From 35. So definitely want to get back to 35. I get back. Okay. And then...

--- Customer engagement ---

BRETT

13:47 Gotcha. Okay. Another thing that we want to focus on for you guys, essentially turning your service business into a customer service because at the end of the day, your customers are the most important part of your business without them. Hey, you probably don't have a job. We don't want that. So, pretty much what we focus on is what I like to call the agent online customer service. And Eugene, what I like to relate this to his, if you ever ordered something off Amazon prime.

EUGENE

14:15 I have, but my wife just pro it that.

BRETT

14:18 That's typically what I hear. Well, I don't think your wife uses it though.

--- Customer engagement ends ---

EUGENE

14:25 That's way too damn easy for her to buy stuff.

BRETT

14:28 Exactly, right. All the words out of my mouth. It's easy for the customer, that customer. Yeah, the customer can sit on their couch. It can be watching the football game or watching a TV show ordering whatever they want.

--- Customer engagement ---

BRETT

14:38 It's really easy to use. So, I like to relate Amazon prime to service trade in a way that, hey, we're telling the customer everything we're doing for them. When I order that package off Amazon, I get an email saying it's out for delivery. I get a picture of at my doorstep. It's incredible customer service at the same exact level of service. I want to help you guys provide to your customers in the commercial mechanical space. So some different ways will help out with this. First off, you've gotten route notifications, which is really that first touch to the customer, letting them know we are on the way. Customer's going to receive a picture of the technician as well as their EPA. And I'll send you one of these to your inbox right now.

BRETT

15:17 Next step quotes, I understand that, hey, when you guys are in the field doing your PMS or maintenance work, you're probably finding deficiencies or repair opportunities. So I want to number one, give you guys a really easy way to track and log those repair opportunities from the field. But number two, a really easy way to quote them out for the customer. This is what a quote looks like. What you're seeing on your screen inside of service trade.

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

BRETT

15:37 But on lines of customer engagement, I wanna make this quote really easy to approved from your customers point of view. So they come in one click approvals, but not only that they have all these pictures that you guys took on site. So you're changing the conversation from strictly the price to actually what happened on site. They're much more likely to approve that quote if you show them what the problem is.

--- Customer engagement ---

BRETT

16:00 Next step, we've got service link. Essentially, it's a fully encompassing post service report that has the ability to go out to the customer after the work is complete, but my God.

EUGENE

16:09 Give me one sec. I'm sorry, give me one second. Sure. I'll be right back with you.

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

BRETT

16:32 No, you're good. What I was getting out with service link is it's really a post service report I send to my customer telling them, hey here's, the tech who came out here's, what he did on site here's. What do you use? I'm also gonna have any pictures, any of the to your point refrigeration checklist? I'm also any deficiencies you guys found? So really the point of sending this is sending it before your invoice. So they know everything you did for them. So when they get that 2000 dollar invoice, it's not a problem. And then Eugene kinda going off of that you mentioned, did you say BuildOps does not have a customer portal?

--- Customer engagement ---

EUGENE

17:08 Doesn't have an online customer portal, which honestly speaking, I'm really not getting fixated on because the online customer portal was what brought me to Davis where last time none of my customers use it, nobody really wants to use it. So honestly, it's not that important. But... yeah, if it's a good portal, we'd I'd start, you know... bringing it out to people.

BRETT

17:35 Yeah, absolutely. So I will tell you we do have a portal sits right on your website. I checked your website out. It'll be very similar to what you have rocking right now, but essentially at customers can come in, they can view your guys, upcoming service schedule for their location.

--- Customer engagement ends ---

BRETT

17:50 So today's jobs, upcoming jobs, recently completed jobs, but also a space where they can see any kind of service history. So instead of calling you guys in the office, I can just find that information on your website.

EUGENE

18:01 Now, see now, I'm gonna now I'm going to start asking questions since we're at this point in time. So I have, so I have companies that have 20 30 built inside of time in New York City, that being said, we have one chief engineer that... was handling. Let's say 10 11 buildings? Okay. That chief engineer, would he be able to have one log in and I'll see all 10 11 I was building?

BRETT

18:35 Or if you need.

EUGENE

18:38 10 or 11 separate log INS?

BRETT

18:40 In that situation, he would have one log in. And because let me ask a clarification question, those 10 locations are all getting billed to the same place, right?

EUGENE

18:50 They're getting billed to each location?

BRETT

18:52 To each location, is it like a property manager manages both those locations?

--- Assets ---

EUGENE

18:57 Yes, were employed by the property management company.

BRETT

19:00 Gotcha. So in that case, yes, it'll be one log in where that chief engineer can come in and see all 10 locations. Okay... good question.

EUGENE

19:12 Yeah. We have a lot about, what about equipment inventory for those locations?

BRETT

19:17 When you say equipment inventory, you mean customer equipment?

EUGENE

19:20 Yes.

BRETT

19:21 Yeah. We call those assets inside of service trade. As you can see right here, like locations and assets locations is where you deliver work assets as pieces of equipment... gotcha. And what would that be?

EUGENE

19:32 Does that, what does that inventory? What does that inventory portal look like your software?

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

BRETT

19:42 What is the actual customer portal look like? Or what does the inventory inside of service trade look like?

EUGENE

19:47 Inventory inside of service trade?

BRETT

19:49 Yeah. So if you can give me maybe five minutes, we're going to get there and I'm gonna go through all of that. Okay. Yeah, you got it.

--- *Invoicing* ---

BRETT

19:54 Awesome. Last thing I have on my slides here, Eugene is invoice link. I didn't even ask you what accounting system do you use?

EUGENE

20:01 For enterprise?

BRETT

20:03 Perfect. So, we do have a native integration with Quickbooks free of charge on that one as well. However, we do have this one feature called invoice link. It's essentially a way for you guys to get your bills out to the customer a little bit faster by sending that invoice out via service trade, which also has a one click pay. Now, button, customers can come in and pay you guys with credit card or with AC, H, a customers utilizing this feature today tend to see about a 15 to 20 day improvement in their days outstanding. So, really just trying to improve that cash flow and get you guys paid faster.

--- *Customer engagement* ---

EUGENE

20:36 Everyone's problem.

BRETT

20:38 Have salute with. So Eugene bringing me to the end of my slides here, this is my last one for you. But at the end of the day, everything we've talked about this far as

significantly helped our customers increase their revenue. On average, customer saw about a 23 point four percent increase. What would that mean for you in Stonewolf?

--- Invoicing ---

EUGENE

20:56 More concerned about the cash flow as opposed to the increase in revenue.

BRETT

21:01 Would you say cash flow is a pretty big issue today?

EUGENE

21:04 Gosh, flows always be issue right now. Nobody wants to pay their bills on time.

BRETT

21:09 And when you say that, is it a matter of, let me ask us how long does it take you guys to get a Beverly customer after the works complete?

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

EUGENE

21:18 Bill out to the customer or a day or two?

BRETT

21:20 A day. Or two. So, it's just them now paying you on time? Do you think if you showed that customer everything you did for them from the minute you got to location, to, when you send that Bill, they'd be more receptive to paying you guys on time?

--- Type of work ---

EUGENE

21:36 We already do all of it and nobody in the commercial and they'll show market honestly speaking, when you're dealing with large property management firms and real estate companies that own... crazy amounts of property around very large cities, they really don't give a shit, honestly speaking with the engineer cares what she did and all that.

--- Type of work ends ---

EUGENE

21:54 But accounts payable is still gonna drag their feet for as long as possible. Not, so it's you know, it's good to have all of this regardless, right? And make sure the professional you're if you're being brought into the modern world, but they're gonna look at it. They're gonna, and they're still going to pay you late. So.

BRETT

22:12 Yeah, unfortunately, that is very much a fact of life. And Rose, I talked to three or four mechanical contractors every single day and everyone tells me the exact same thing. I wish there was more I could do to help you guys there.

EUGENE

22:23 Yeah, it's less than the software obviously does what it's supposed to do. You know, we dispatch tracking, et cetera. It's there's no way that you guys can help us with this with these things. You know, it's not, I'm... not really up to you guys.

BRETT

22:42 Yeah. You're right? It's up to that?

EUGENE

22:43 Hi, sorry.

BRETT

22:44 Is...

EUGENE

22:45 It right? And these are massive corporations.

--- Pricing ---

EUGENE

22:48 These are massive publicly traded corporations. You know, what are you gonna do? You're gonna, you're going to send a letter of the man? Okay. So, I'm fine. Put them in collections, gives a shit, you know?

BRETT

23:00 It's over like five grand. It's nothing, it's over like small amounts of money to grand, five grand. It's so small.

EUGENE

23:08 You know, average ticket pricing is between three and 12,000 dollars, you know, a big fucking deal. It's nothing to them.

BRETT

23:18 Yeah. Okay. I see what you're saying. It sounds like we're very much on the same page, but yeah, I think everyone wants to get paid faster. It's just, how can we, realistically, how can we do that?

--- Invoicing ---

EUGENE

23:28 Yeah, I know, and nobody uses credit cards, you know, credit cards is kind have a credit cards is when you're dealing with a small business... or residential, you know, it's not. Yeah, you get what I'm trying to say?

BRETT

23:45 I do in your world, it's probably.

EUGENE

23:48 Yeah, it's all P goes. It's all a check later on, you know?

--- Access to information ---

BRETT

23:54 Yeah, I gotcha. So I'll keep that in mind as we go throughout the meeting today. Any questions before we get started Eugene?

EUGENE

24:02 No, no.

BRETT

24:03 Cool. So like I mentioned before, we are hosted on a WS. So service trade is a fully cloud based system. Technicians in the field is going to be using some type of mobile device.

--- Access to information ends ---

BRETT

24:13 But this the office, all I need is a browser, an internet access. But the first thing you're gonna see is this service dashboard which is really giving you all visibility into your day. You got your daily schedule here's. Your technicians with the job they're going to at whatever respective locations for the day. Also on this page, you've got visibility into all your different work orders. So if you do have anything that's overdo, we're letting you know front and center that, hey, you need to schedule this so you can go deliver the work and get paid. Next stop. We've got job without appointments do in the next two weeks, which is really just, I don't want anything to be overdue for you.

--- Recurring maintenance ---

BRETT

24:47 So I'll let you know ahead of time to go ahead and schedule it... and on that you guys will put your due dates in for like specifically your recurring services. Hey, we have to go out quarterly and do rooftop, you know, one two and three, you will put those due dates.

BRETT

24:59 And upon onboarding that's how it knows when you're going out. But this one right here is really important. So past jobs to be more complete. Essentially what this looks like is your tech goes in the field. Does this work order? Does this checklist? Whatever needs to do once the clocks out, that work order bounces back to this bucket, allows your technician to come in, your office staff, excuse me to come in review it.

--- Invoicing ---

BRETT

25:21 Let's make sure my parts, my labor, my job items are correct. From there, I'm simply going to complete it in service trade? And it's gonna fall down if my completed jobs to the invoice. And these are the ones you either gotta push through service trade or push over to Quickbooks via the integration to continue building like you do now.

--- Invoicing ends ---

BRETT

25:40 Also on this page is current tech locations. So this is not real time truck tracking. These tech locations are based off your technicians mobile device. So essentially, when you're techs, o'clock, event, we're gonna take a Geo snapshot of where that tech is located. Does dropping a pin on the map.

--- Recurring maintenance ---

BRETT

25:53 Like you're seeing right here. That makes sense. And then for you guys specifically, we have the concept of offices can be individual brick and mortar offices. So for you guys, if you wanted to do a New York office in the Florida office, you could do that. You could also break it up into like heating, cooling, refrigeration, however you guys wanted to it.

BRETT

26:20 And then important to point out there are permission settings. So if you don't want people down in Florida and see the New York work, we'll set it up that way so they don't have visibility into that information. Okay. So what I set up for today is I set up a PM job means the same thing is work order inside of service trade, just to show you something real quick how we're set up is this is your ship to information. This is your Bill to information shift to being where you deliver the work. So we're working at comcast center today. I'm gonna take you over there and we're gonna get into those assets we were talking about a little bit earlier right before assets. Let's talk about your recurring services. So right here under services is where we are gonna track everything we do for the customer. So right at the top, you can see I have quite a few repairs from deficiencies I did find in the field. But as I scroll down, I do get more into my recurring work. So let's take this quarterly PM. This is your guys

burbage inside of service trade. Above. It is the piece of equipment that we're working on and you set it up on a recurring basis that you come out. So this one is, hey, we were supposed to be out there in may of 22. It's red. It's saying we didn't get out there. It's overdue but you guys come in and set these up on a recurring basis that you go out. So how large is this window? Hey, do I have to get it done today on, you know, November fourteenth throughout the whole month of November or custom date range. And then how often does this occur? I hit monthly every three months making it a quarterly service. If it's semi annual, I'm going six if it's annual. I got my own Tam. Does that make sense? Yup. Cool. So that's how we're tracking your guys recur services. Like I mentioned back on that dashboard, they're gonna funnel into those buckets as it comes time for them to be due.

--- Assets ---

BRETT

27:58 We're going to get into further tracking those here in a second as well. But I know you're curious about those assets. So this is how we track them inside of service trade. Let's take my H back units. For example, I can get really granular type of work or the type of information I put in here as you can see what this one, if I don't have a ton of information you guys put in what you have, your technician can build it out as you go up those out to location time over time. The reason we are tracking this is for really Rich service history. I want to know every service we provide for this piece of equipment, every work order we've done every deficiency found or quote, provided it's all here for me. All this information is going to be accessible via the portal as well.

--- Assets ends ---

BRETT

28:40 Questions. So... how does this compare to what you're working within Davis, where, and what you've seen with BuildOps?

EUGENE

28:50 Famous, where's is... not nice to call out or retargeting for double grumbling about where?

BRETT

29:00 Yeah. What about BuildOps?

EUGENE

29:03 I gotta say your flow is not as refined there's.

BRETT

29:08 In what way?

--- Assets ---

EUGENE

29:09 Well, so... that's... their information tracking system, their database, right? So the way it looks on their side is when you have piece of equipment, you have a photo of the piece of equipment, then you have, then you have the basic information of it. And then when you open it up, it gives you all the granular information.

--- Assets ends ---

EUGENE

29:35 She doesn't put it on. It doesn't put her on the screen. You're gonna sound messed up. But most people that's sending the office and the tax on site, they really, you know, for lack of a better phrase, they really don't give a shit. You give them too much information, you know, start getting overwhelmed. Realistically, the people that use this granular information or the job site managers myself, and maybe some people in the office. But as far as, you know, tax, they don't need to see any of this stuff. I'm just where it's going to overwhelm them and they're going to do something stupid.

--- Access to information ---

BRETT

30:09 I understand what you're saying. I think it's important to point out what you're looking at is the office view. So permission settings. So you guys set it up to who can see what. But once we get out to the field, you're gonna see how kind of reformed it is for the technician to not give them to not bought them down with all this information.

--- Access to information ends ---

EUGENE

30:27 Like, let me give you my approach. So, my wife is a nurse practitioner, right? And I found out from her... that medical records have to be written on a third grade reading level.

BRETT

30:47 I've heard that family medicine.

EUGENE

30:50 Yeah, it has to be written on a third grade reading level, not for the doctors and nurses but for the patients. The majority of people in this country cannot read past a third grade reading level. And I'm not saying that my technicians can't read, pass the third grade reading level, but I'm saying I would not be surprised if they can't read, pass the third grade reading level. You know... same thing that listen, same thing goes for customers just because he's a chief engineer. That doesn't mean that he could read pass the third grade reading level, you know? So everything has to be done in a way where it has to be a stupid proof as possible and as simple as possible.

BRETT

31:30 Yep. Nice.

EUGENE

31:32 Pretty picture stuff like that build ups has that, you know, a little better refine... that's really it, I mean, from my side, this is awesome. I just, I worry about other people looking at the screen, not just me.

BRETT

31:46 Okay. Yeah. I mean, I'll I can really call out on that. Is, this is my demo account, so it's set up where we can see everything, right? Yeah, to your point, you want to set it up so people in the office can only see, you know, what the piece of equipment is. We can make it that way.

EUGENE

32:02 Yeah. You know, just like I said, it's maybe they can read at a higher level. I just wouldn't be surprised if they can't if that makes any sense.

BRETT

32:14 No, I see where you're coming from, you're making me laugh because honestly, I think the same way. So I under.

EUGENE

32:20 It, it is what it is, you know, it just it.

KURT

32:25 It is what have you?

BRETT

32:26 Yep, we can hear about that.

EUGENE

32:30 Yeah, people are still for them and they're getting worse.

BRETT

32:34 No, agreed. And especially with like the labor shortage, you have to, I mean, you need people to work and you're not probably not going to find the best person in the market, but it's that labor shortage. You're not hiring the smartest people in the world today, just the fact like.

--- Assets ---

BRETT

32:53 Yeah. Okay. Let me continue on through here. And just so I can get the full picture of service trade and we'll walkthrough it. So also on the time that you've got a list of all the deficiencies at this location tied to what piece of equipment for that service history you've got every quote at this location.

BRETT

33:11 But big thing I wanna point out is contracts and service trade are different pricing structures. So I imagine different customers of yours receive different markup rules. Yup. Cool. So that's pretty much what this is. You can have one. You can have 100 doesn't matter how many you have, but essentially, you'll default these to your customers.

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

BRETT

33:31 So when it does come time to quote them or to invoice them, markup rules takes over, you don't have to change the prices. Sure. Any questions on this page? Nope? Alright. So what we're gonna do is I'm gonna jump into a little bit of scheduling, show you how we're going to make sure we don't miss any of those PMS.

--- Deficiencies ---

BRETT

33:49 But then I'll take you through the whole process. I'll go in the field, be a technician. I'll log a deficiency. I'll do that refrigeration checklist you were talking about. We'll come back and we'll invoice and quoted out... right? So with scheduling, we have this report right here. It's called service opportunities thrown button.

--- Recurring maintenance ---

BRETT

34:13 So this is service opportunities essentially report that you run things all your different locations inside your service trade account, looks for jobs that are do within whatever parameters you select right here. So I search for recurring services, this demo account. So bear with me... it pings all those locations. It tells me that, hey, I've gotta get all 19 these jobs done in three months just for the demo. I'm gonna go ahead and select a couple of... so some of these have multiple icons, what that's letting me know if there's multiple services do with these location. So let's go check out capital, want to Reno, scroll down there's. Multiple services do all in the month of February. So we're gonna throw those all in one ticket for you guys. Unless you select otherwise, really just ensuring that, hey, if we're going to capital one to Reno, let's get everything done. I don't want to send my truck there three times this month.

--- Dispatch ---

BRETT

35:00 You come in, you select the job type. I picked recurring services. We're going to say these are all PMS. We're going to simply create these jobs. They disappear from this screen. But where they do falls over onto our map based scheduler... you have the ability to filter it out based on your guys offices, different service lines, which essentially just different type of work. You guys aren't doing a whole lot of autoclave

works. So you're not gonna see that in your account. You'll only see what you guys do.

BRETT

35:29 How this works is all your jobs are going to be reflected up on this map right here? Zoom out here. Alright? We're going to go out here to the Tennessee border. So all these pins you see across your map, they are all jobs. Some of them have colors associated. Some are big squares, some have calendars, some have check marks. If there's a calendar in the pin that means this job is scheduled. I click on it. I can see it was scheduled for the thirteenth at 145. But what we're here to look at is these gray pins on your left hand side or all your technicians. And you guys, these would be your offices, but all your technicians have a color associated with them that's how, you know, what technicians go into, which job, this job out in pigeon Forge, Tennessee. I want to schedule Brett for it. I'm a simply drag and drop her name. It turns orange. We can see, yeah. Now assigned a broke. I want to schedule this job. I simply drag it and drop it to whatever day I want to schedule them for it gains that calendar telling me it's now schedule. If it's a multi day appointment, I drag it to multiple days. It turns into this square next to the calendar it says to meaning it's two day appointment is can be three days, four days, three months you pick. But also pointing out we can do multiple technicians. So if I drive Tim on here as well, thanks for the person. Now there's two technicians and that's reflected down here as well. Okay? This is really just helping our customers kinda schedule their text in a way that makes the most sense geographically. If I'm working out here in Durham and I got a bunch of jobs in Raleigh, I don't want to send the text that's up in Durham to the jobs in Raleigh. If I already have a guy down here. Perfect. Any questions?

--- Recurring maintenance ---

EUGENE

37:04 Nope.

BRETT

37:05 Right from here, let's take you to that work order on. Let's go through the process. So what I set up is these two different PMS I'm just pointing out that you can have multiple services on one ticket. And we break this up in a way that we call service granularity, in a way that you can try the correct parts, labor job, items, attachment and comments to the individual service at hand, knowing that you guys very well might have multiple services at one location.

--- Recurring maintenance ends ---

BRETT

37:32 As we scroll down, your guys part list is going to be in service trade. You can see it's broken up by service right here. As far as what the technician needs to use on site. This is if you know what he's using. If you don't this would probably be blank until your technician fills it out... but downloaded attachments.

--- Access to information ---

BRETT

37:48 You can see there's nothing here. We're going to go out to the field. We're gonna fix that. And when we come back there's going to be information for us. So this is what our mobile app looks like. I'm currently on an iPad. We're compatible with both iOS and droid devices.

--- Tech On-site ---

BRETT

38:01 So today here's our comcast center job. I click into it. I clocked in and route to this job 23 minutes ago. And Eugene, what I did is I came in here and notified you is my customer that I was on the way, that was that and route notification. But now I'm gonna clock out of band route. I'm gonna clock in on site. This is going to track my hours in the background. I don't have too much more. But as far as what I'm performing on site, I'm clicking up here in the services is telling my technician everything that use performing on site.

--- Tech On-site ends ---

BRETT

38:29 And if there's certain things that you don't want the tech seat, for example, price that can be turned off. But this is just that same verbiage from the office... down under attachments. A lot of our customers are taking before and after pictures or scanning receipts, whatever it might be.

--- Tech On-site ---

BRETT

38:46 This is a spot to do it because anything I take on this job is going to be reflected in the back office and you can have multiple text taken picture. So if Kurt wanted to take picture, she could put them on the job as well.

BRETT

39:00 Down under job items, we're tracking the material that we're using here's.

--- Quote templates ---

BRETT

39:04 Everything that you initially saw from this ticket. If your technician needs to add anything additional, you can simply go ahead and add apart. We can come in and say, you know, I use the widget on this job, grab that widget. I use three of these things depending if you want the test to see pricing or not.

--- Assets ---

BRETT

39:20 It can say 15 dollars Oregon say zero dollars, but I can simply add this in to make sure you guys Bill for the correct amount.

BRETT

39:31 Talking about those assets. You saw it from the office. I want to show you from the field right here. This piece of equipment. So really granular, just shows my technician what pieces of equipment or tied to disappointment, can also see anything related or all the piece of equipment.

EUGENE

39:45 This location.

BRETT

39:47 So I can click into one of these and if I don't want to see this, I can turn it off or I just don't have to look at it from the tech. But this is where your tech would go for service history instead of them calling the office to figure out what happened here. Last time. They have every single work order that's been done to this piece of equipment at this location. So if I go back to November first, I can see a couple of things, I can see who is my technician.

--- Tech On-site ---

BRETT

40:08 So I would slide over and see it was myself. What did I do on site? Looks like I did the same two PM we're doing today. Did I take any pictures? It looks like I took a bunch of pictures. I did a refrigeration checklist and I got my work signed off on.

--- Assets ---

BRETT

40:23 So all that information is here for my technician at their fingertips. They don't have to call anyone. They have everything they need. Do you think that level of service history would be beneficial for your technicians in the field?

EUGENE

40:38 The other thing I was gonna call me, so I have the information again, third grade reading level dude, we're not dealing with the BrightEdge, you know... not dealing with the brightest people question for you are as... far as workflow, right?

--- Forms ---

EUGENE

41:00 Checklist, let's say, so I, a lot of the stuff... that I'm gonna do, I'm gonna put a checklist together. Okay? For example, a... checklist of things that needs to be done. So here, you know what?

--- Forms ends ---

EUGENE

41:18 Let me... give me one second. I'm going to show you guys something. I need you to understand that this is your eyes only better et cetera. Don't look at it. Don't discuss it here's. An example. This is, let me share my screen.

BRETT

41:35 Yeah, I'll stop sharing. Yeah.

EUGENE

41:40 If only I knew how to share other, right there, share screen, big green and got them button. Okay. Do you see my screen?

--- *Forms* ---

BRETT

41:49 Yeah.

EUGENE

41:50 Quarterly preventative maintenance inspection. Yeah... you see all the questionnaires, put them in condenser information, clean and Inspect all these checklist. I want to be able take a checklist like this, digitize it uploaded into the software. This way. When I dispatch attack for all cab, Lyndon clean, this pops up and his workflow, this opens up, you can fill this out and his workflow.

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

EUGENE

42:17 If there's any missing fields, they will not let him a complete the workflow. And then at the end of everything... sorry, we get a signature by technician, signature by customer and it gets submitted. Is that possible? I'm gonna say.

BRETT

42:36 Let me, that is possible. Let me just set something up and I'll show you in a second. You got it. So I can re, share my screen so you can see what I'm doing.

--- *Forms* ---

EUGENE

42:49 I see if there you are, I was gonna say.

BRETT

42:51 So...

EUGENE

42:52 Portal so forth?

BRETT

42:54 Yes, I'm gonna show you two things. I'm going to show you the JV way to do this in the varsity way to do this. Let me just find the right job.

BRETT

43:10 That's it.

BRETT

43:18 All right. So, two ways to do this. I'm going to show you the JV way first, which is essentially a billable PDF, the varsity way as I like to refer to them is the, hey, it won't, let my technician move on unless he answers this question. Do you wanna see both three? Do you want to jump to the?

--- *Forms ends* ---

EUGENE

43:36 Well, you know, we try to be a professional company. Let's go with the bars.

BRETT

43:41 Right.

EUGENE

43:43 Try, we don't always do it. We don't always make it, but we try.

BRETT

43:47 Understandable. Let me just clock into this new job. I set up a second.

BRETT

44:01 Alright, there's my 1,245 job. Essentially, what your technician does is the clock into the job at this point is simply just figuring out what needs to be done. Crap too. I don't have the right account setup. Do I? No, this is my fire account, Kurt, are you still with me?

KURT

44:20 I am, and I fire accounts. If once you keep going and I'll try and log into... the HB AC.

BRETT

44:30 Okay, cool. So little audible, I can show you the JV version. I'm just not set up to show you the RC version on my account, but Kurt is gonna get set up and we'll show you in a sec.

--- *Forms* ---

EUGENE

44:44 You got it.

BRETT

44:45 So two ways that can work... on our work order, I can go hit view more details. It's gonna do exactly that. Show me a little more information. My technician can come in it actions hit download blank paperwork in that exact form that you just shared your screen and showed us can be pulled into here. That form can be dispatched to your technician with dispatch roles. If it's a refrigeration job, they get the refrigeration for H back jobs, get through H back for, I have multiple here just because it's my demo account. But in this case, if I say I need the refrigerant form, I'm going to simply hit generate.

--- *Forms ends* ---

EUGENE

45:20 So here's so awesome feature loved. Now here's the problem that I have with this, right? I don't want to, this is gonna sound really messed up. Bear with me. I can't give technicians options like this. Okay?

BRETT

45:44 That's why I think you're leaning towards diversity version as well?

EUGENE

45:48 Yeah.

--- *Forms* ---

EUGENE

45:48 This opens up too many opportunities for them to select the wrong forum, right? Because we have this specialized form for all. Again, we have another specialized form for boiler inspections for one customer. We have another specialized form for another customer. You know, everybody wants to see things kind have their own original way.

--- *Forms ends* ---

EUGENE

46:06 You get too many options to a guy like this. Well, attack on site. You know, they're gonna listen, they're gonna overlook it. If there's a common name, a similar name, whatever the, they're going to make a mistake. They're not gonna catch it. And I've been noticing... I am guessing the bars to be way, does it in an automated flow where the guy playing with the phone doesn't have to think about it. Yeah.

BRETT

46:30 Correct. And what I'm thinking right now is so like I was saying before we work with mechanical contractors and fire protection contractors, if you're okay with me going through the RC flow just with fire protection information, I can show you how it works, not.

EUGENE

46:43 I'm just give me one second one of my Texas call and they're gonna answer them. See what I mean?

BRETT

46:46 You do that? I'll get set up?

EUGENE

48:08 Sorry back with you.

BRETT

48:10 You're all good perfect timing. So I just switched my account to my fire accounts so I can show you the workflow. One thing I'm just gonna point out is this is going to be your guy's information on here. You're gonna see a lot of buyer information on my demo because it's my fire account, but it's your guy's information that we're going to put it into here. So, yes, I wanna take out a lot of the area or areas that your technician can make a mistake that's where the varsity version it's called service forms. It's another product that we have comes into play. And so essentially all your tech does that they need to clock into this job there at this location, clocked in on site, figuring out, hey, what am I even doing here?

--- *Forms* ---

BRETT

48:49 So I set up a sprinkler inspection. And in this scenario, basically what happens is it takes about 2025 seconds, but the form is automatically dispatched to your technician. So they don't have to, you know, go pick the form or potentially make a mistake, whatever it. And so... right at the top, you can see my form is downloading.

--- *Pricing* ---

BRETT

49:09 You can set this up to get a push notification that drops down. I just don't have that setup because it's my demo account. But here's the form right here. And so the job number is the same as the one we're working on, ending in 1,740 job number 1,740.

--- *Forms* ---

BRETT

49:25 I come in as a tech. I can put the date, all my job information about the customers in here. So I can say that, hey, maybe this is an annual inspection or

quarterly inspection, whatever it is. And you can set this up to be, have answers prefilled. Like a lot of these answers are already filled out for me. If it's certain things like this. There's just questions. If you want to prefilled. You can do it if you want your technician to actually go in and fill this out. They can do that as well. That can be left blank to make sure your technicians getting accurate information, totally up to you.

--- Assets ---

EUGENE

49:56 No, they have to be, have to be left blank.

BRETT

50:00 Yep. That's fine. Some, most of my customers are leaving it blank. So yours would be totally blank, which is totally fine. From here, your technician is gonna click down to the asset or the piece of equipment. So here's the piece of equipment, all the information.

--- Forms ---

BRETT

50:16 I know it was already in there. I can say, maybe I go down to my inspection side and I want to click down to sprinklers right here. In this case, I have one of my questions at blank. So it says, is this, you know, piece of equipment? In this case, if I say no, this is conditional logic.

--- Deficiencies ---

BRETT

50:35 It pulls up another set of questions based on what your tech mission select. So when I hit no, hey, is there corrosion? Let's go ahead and say, yes, there is a deficiency. So maybe I say there's a crowded sprinkler head right here. And then from there, I can automatically take a picture of the deficiency.

--- Deficiencies ends ---

BRETT

50:55 And this is something that we're going to go quote out from the office. I'm taking, you know, it out of my technicians hands to mess up because depending what they answer additional questions, follow-up does that make sense? Yes. Okay. So as easy as that, I would go through, fill out the rest of my things here. Say.

--- Forms ---

BRETT

51:21 Take another picture... right? So all those are filled out for me. I would continue going through all these fields right here. In your case, everything, would it be blank?

So they would go through this once they're completed. If there's any additional efficiencies, they can be added right here if they want to add them at the end and you know not do it through the process I just showed you.

EUGENE

51:42 But...

BRETT

51:43 When I'm done with this, I can hit this check mark and I can say, hey, I'm done just kidding service forms won't let you submit it because you didn't fill out one of the required fields. I'm pretty sure this is what you're asking for. So you're tack at that point can hit review errors and it says, hey, you forgot to fill out your questions and sign off on this form. So I'm gonna put my answers in. I'm going to say, hey, I feel about this inspection today, 1,251. And I'm gonna go ahead and put my text signature. It from there, if I tried to submit this form now, it lets me, and it lets me know that I filled out 161 123 fields. So I can submit that form. It goes from my dispatch screen over into my submission screen. It is currently submitting to the cloud right now. Is that along the lines of what you're looking for with forms? Yes. Okay. That's kind of what I figured. So thank you for working with me and let me play around in my fire account.

--- Tech On-site ---

EUGENE

52:39 Fine.

BRETT

52:41 Cool. There are... when you guys are on site at location, are you getting your work signed off on?

EUGENE

52:50 Yes, absolutely.

BRETT

52:52 Okay. So let's go over that and then we'll go back to the field, uncover all of this. So create work acknowledgement built right into the application. You can do it here. You can also have it on that form. We just filled out to what's required up to you. But as a technician, I can come in and say, you know, who's my contact. I'm gonna select myself onsite contact as attack. I can go through and make sure I put everything correctly in here. If you don't want your text to generate the invoice, will turn that off. They won't even see that button... that we would simply hit review. I would turn this around in my onsite contact. So I would go through this review everything, make sure it's correct. I would agree to your guys t's and c's I would come to the bottom and acknowledge, make sure the information is correct and get a signature from my customer. Easy as that. Eugene. Any other questions as far as things I have not covered yet from the field?

--- Forms ---

EUGENE

53:48 When you're working on a project, selecting the assets that you're working on, updating any information or anything or adding assets, excuse me, adding assets inventory?

BRETT

54:02 Right here. So that can be done through the form that service forms that we just went through. It. It's really easy to, you know, scan it using like iOS.

--- Assets ---

BRETT

54:10 The OCR capability is, I can scan the name plate, get all the information. And if I don't want to type it or I can add it right here via the mobile app and I can say add an asset, what kind of asset do I want to add? This is my sprinkler account.

--- Forms ---

BRETT

54:22 So I don't know if I have H back, don't, but I have sprinklers so I can say, hey, I'm gonna add a dry sprinkler and I can go and fill out any of this information right here. You don't have to fill out everything. So whatever your technician puts, it does reflect back in the office.

--- Assets ---

BRETT

54:38 Another way to do that is if I find more information about this piece of equipment, I can click into it and I can simply hit edit. Maybe, you know, I didn't have a size before, but I found one today. I can edit that, that's reflected in the office... that we were looking for yep.

--- Assets ends ---

KURT

54:56 Hey, Eugene, how was it started? But how is that done with BuildOps is pretty clean in that respect.

EUGENE

55:05 Same, basically the same way. I mean, it's slightly different look and view. And honestly, once we're done with this phone call, I'm gonna call BuildOps back that goes through the workflow with them just because... I don't really remember honestly speaking, I remember that... they have, how do I put this? They look more like... they look more like using an Instagram account, right?

EUGENE

55:45 No. Again, when you're dealing with people that aren't really paying attention at work.

KURT

55:49 Yeah.

EUGENE

55:50 Most people don't let's be honest. I guess that's easier because it's are more native interface. As far as that goes... that's where they just, they look different. You guys kinda have that look and feel of a company that's been around for a long time. It's been doing this a long time. There. Petition app is more... Bolton millennial friendly.

KURT

56:18 Nice.

EUGENE

56:20 I mean, listen, I'm 32 years old, right? So I'm not exactly a boomer, I'm not exactly up there in H... I don't do a lot of social media though. So kind of to me, it's whatever I'm perfectly okay with your interface, but their interface, it looks like somebody sat down and got somebody really high and then tell them, hey, how would you like to do this work? Right? And it just, it kind of looks and feels like Instagram there's does the same thing though.

BRETT

56:52 Definitely does the same thing. I think it's a coordinate that call out. One thing you said there, it looks like we've been around for a long time. We have been around. We've been around for 10 years. That's why we have the customer base we have. So I think it's important for you Eugene too. If you do go that BuildOps direction. I really think you need to get a reference of someone who does exactly what you do, that's live and can actually speak to what you're doing. Now, what they promised?

EUGENE

57:17 That, that would definitely help. I do know that one of BuildOps customers is a second. It's been scheme mechanical in jersey. They're pretty big company. They're actually a very big company. That being said... I haven't spoken with some direct directly.

EUGENE

57:51 Sounds great.

EUGENE

57:59 I haven't spoken to him directly about it, but the problem is it's really difficult to speak to anyone about what software they use.

--- Purchase decision ---

EUGENE

58:08 I know when I had the conversation with the front of mind down in Texas years ago when he wanted to switch Davis where, you know, I already on board. And so I told them listen, it's... this, you know, but now it's very difficult finding anybody that will actually have a conversation with you about, but BuildOps, like I said, it looks more... stupid.

--- *Purchase decision ends* ---

EUGENE

58:32 Safe. You know, people get stuck on stupid. You want to try to make it as safe as possible form... if that makes sense?

KURT

58:41 Yup. Yup.

EUGENE

58:44 No, I really, I like the, I like the intuitive logic that... you know, you have to go through all of the steps... to close out a form... right? But then at the same time the now the complexity of I'm sorry, give me one second. Let me just send this email this way. I'm not sounding idiotic on the phone and I can focus on you guys again.

BRETT

59:15 Yeah.

KURT

59:16 Sure.

--- *Forms* ---

EUGENE

59:25 Okay. Cool. Yeah. Basically. So, so in BuildOps, when we open up, when we open up a work order for a particular client, the office is actually responsible of attaching the form to the call, right? It does not allow a technician to make any kind of selection of what forms are included, not including all that he shows up on site. The forms are pretty updated, pre-populated form in the system he works and what he works with. The she works, what she works with... differences it kind have when you call it the JV way, it opens up the form. He's gotta fill out the PDF form and then he saves it from within the app and then it gets submitted altogether and it creates the form automatically by default. So my question to that would be, you saw that all gam form, if we create an automated form like you have in your system, would your system be able to pre-populates that form with all the answers? This way? I can just check it over and submitted to the customer. What I have to manually enter that information to that form that they want and send it out to them?

BRETT

1:00:29 Really up to you. Yeah, you basically set up the rules as far as what do I want pre-populated on this form that's what we will pre populate and then you can leave certain areas blank that your technician has to fill out. So he's actually getting you accurate information from location?

EUGENE

1:00:42 No. What I mean is what I mean is I'll gladly set up that automated form. But then once that automated form is complete, will generate all the answers to that template that all again provides for us. Or will I have to sit there and read, type all the information out and work quarter into that form.

BRETT

1:01:02 We talking about JV version or versus diversion?

EUGENE

1:01:05 Barsi version?

BRETT

1:01:07 Or city? No, it'll pre-sale...

EUGENE

1:01:10 If that specific template?

BRETT

1:01:12 Yes. And that's part of onboarding. You said you tell us what you want, set up what you want pre-populated and then when the technician gets it will be pre-populated and that stopped.

--- *Forms ends* ---

EUGENE

1:01:23 I don't hold on a second. I don't think we're on the same page with that. Give me one second. Can you do me a favor? Please? Just so it's easier for the both of us. Can you please open up that automated workflow form that you have with the automated logic? Because I gotta be honest, I loved that where if you answer a certain way, it opens up... another question request photos that's awesome. I really do like that. But here's the issue with this. Let me share my screen quickly with... you see, I'm on your forms setup. When that is completed... will your software automatically fill in this information, right?

--- *Forms* ---

EUGENE

1:02:09 So the asset that we're working on, will it be able to fit in this information on this specific form would be able to check these boxes? Will it be able to record these answers? Would be able to take the readings that we took on site and put them

specifically into this form or is that something that you have to custom program for us and for a large fee? Yeah.

BRETT

1:02:31 That's exactly what the formal to... populate that information. So, yeah, you can model number, seo number. All that good stuff will be pre-populated on the form, your text and the field collecting those readings, taking those deficiencies, whatever he's doing. And then once he submit that back to the office, I'm going to show you what the output of the form is gonna look like here in a second.

EUGENE

1:02:53 So, my question is if I have this form attached to all again, when he's done with everything in it, submits the Austin I'm sitting in the office and I can print. It has to look like this specifically exactly like this. All the numbers have to be put in. This form comes blank for, you know, this pressure here. L1 L to open it all comes blank. It's a questionnaire. So your software would have to take all the information to tech populates, properly, place it within this PDF form. This is what we can send that out to the customer because say, I'm sitting here.

--- Accounting integrations ---

EUGENE

1:03:23 I'm following, you know, we have handwritten versions of these because I'm not spending any more money to have Davis we're program, Jack should for me and I'm sitting here. I'm transferring handwritten versions into these digital version, so I can send that out to the customer.

BRETT

1:03:36 Yeah. So everything you're talking about, yes, we can do, it would be a custom form through service forms. I don't know what that cost per view?

--- Accounting integrations ends ---

KURT

1:03:46 We'd have to scope it out. I don't know off the top of my head.

BRETT

1:03:49 Okay.

EUGENE

1:03:49 And I have a, and I have a custom form like this for the majority of my customers. So we're talking about a very substantial investment now.

BRETT

1:03:58 I mean, definitely talking about a substantial investment are what's your budget for a project like this? Is it, you know, am I trying to eliminate all the pain or

are restricted money wise?

--- Pricing ---

EUGENE

1:04:12 No, it's just, you know, customers common they go, you know, every time a customer comes in and they want to, they want to specialize form, you know, if it's a couple of 100 dollars here or there, it's not a big deal. But last time I had a custom form made with Davis where it costs me around 1,200 dollars and it took them four months to deploy it for me, which four months, just, you know, that, that's unacceptable. But the 1,200 dollars?

BRETT

1:04:38 No, understandable. I'll tell you right off the bat. Ours is not gonna take four months. Your whole implementation is going to be less than four months, right? Pricing wise, to Kurt point. I think that's something we need to get scoped out from our team. They need to look at your forums and say it's gonna cost this much money.

--- Pricing ends ---

EUGENE

1:04:54 Right. So, let me send you. Let me send you this form because that's going to be a big, that's gonna be... okay. Cool. Sorry, we're also switching but also switching telephone carriers or cell phones for the text. So that's been fun me one second. Okay? Because that's going to be a big contributing factor, you know?

--- Forms ---

KURT

1:05:25 Eugene, are you saying that? Is that form that checklist? Is that different amongst all your customers that they wanted a slightly different way? Or are you taking that warm?

EUGENE

1:05:37 This is a custom form just for all game plasma. So, I'm gonna download this blank form. Okay? And compose. So we have Brett dot... service trade.

--- Forms ends ---

BRETT

1:05:55 Yep. Yep.

EUGENE

1:06:02 Okay. There you are. You guys run on Google just like may look at that?

BRETT

1:06:08 You're emailing me that right now?

EUGENE

1:06:10 Yes, sir. You incorrect?

BRETT

1:06:12 Parent...

BRETT

1:06:19 Yeah.

EUGENE

1:06:19 As soon as I type your names and your photos popped up. So, you guys probably run in G mail, yeah.

BRETT

1:06:25 Really?

EUGENE

1:06:26 Tam full?

BRETT

1:06:28 Hello, we do too, because I hate outlook, so.

EUGENE

1:06:32 You know what? I'm having issues with G mail, I may go to outlook.

BRETT

1:06:36 Really?

EUGENE

1:06:37 Yes.

BRETT

1:06:42 I'm just waiting for that to come through. And I'll take a look at it.

EUGENE

1:06:46 Can you give me one second? I just download?

--- Forms ---

KURT

1:06:49 Hello?

EUGENE

1:06:52 What was that?

KURT

1:06:53 But to build up to have a solution for that?

EUGENE

1:06:56 Yeah, build ups, BuildOps uploads the form like a syllable PDF and then you can go through the flow and it populates it. But the software does it itself. There's no cost associated with it.

BRETT

1:07:12 What is, how is that helping you guys? Is it limiting your technician for moving on without filling out the form?

--- Forms ends ---

EUGENE

1:07:19 Yes.

BRETT

1:07:21 Really? That's interesting because I was really under the impression that there's honestly, no way to do that with billable PDF.

EUGENE

1:07:29 You know what it's I don't know if there, okay. So I'll tell you a story so many years ago needed job. This is before the company took off and everything else. I just need to work. So, I work for a company called Mueller reports, the company that does property inspections for insurance carriers. That being said, there was one specific insurance company called near against bay that had like a 28 page questionnaire per property inspection. And they have the same thing.

--- Forms ---

EUGENE

1:08:04 We had a questionnaire. It was dynamic logic just like you guys, just like you guys have it. And then when we, on our, I had a tablet, it print, it would pre-populates the form with all the information. And if you didn't fill out any information, it would make you go back before it would populate the form. And this was like 10 years ago, you know? So BuildOps BuildOps does have that feature.

BRETT

1:08:32 Okay. Gotcha.

EUGENE

1:08:34 So I can upload that form... et cetera. Have the flow or did you get, did you get the email from me? I just, I sent her a minute ago.

BRETT

1:08:45 Yeah. I did get the email looking over your form right now. It looks like it is what? Three pages.

EUGENE

1:08:51 That's three pages that's per for users. So old, gam, their facilities.

EUGENE

1:09:00 One second.

EUGENE

1:09:05 Just on a building?

EUGENE

1:09:24 Okay.

BRETT

1:09:30 Alright. So with you cool.

EUGENE

1:09:34 So, yeah, with all gam.

EUGENE

1:09:40 I'm sorry, seven pages, we have to select one second sheet.

BRETT

1:09:46 Say that again?

EUGENE

1:09:48 So, what I sent you was a check sheet for one plausible freezer. Yeah, they usually have three units. So it's three of those check sheets. I'm the only differences we don't include three signature pages. We only do one signature page, but the actual data entry check sheets, there are three copies of them because there's three freezes on location. And then we have all the forms for board, their maintenance and inspections. If customers that have two three, four, you know, depending on location et cetera. So that being said, it just that what I'm concerned about is you've even if the solution is correct, the amount of money that needs to be invested to keep every

customer happy with the information that they want. It may not make sense. At that point. It's just... is there a way of creating a form in your system that when, from our end that the office can do that? When it prints this form?

BRETT

1:10:48 My recommendation is so I know we just went through service forms which is in my terminology, the varsity form which does, but the digital handcuffs on your technician, not allowing them to move forward with the amount of forms that you're telling me you have for each customer. It is going to be really pricey to do service forms. There's no way around that. My recommendation on that is using the blank paperwork function. And do you still see my screen? Yeah. Okay. And.

EUGENE

1:11:15 Recommendations is go the JV way.

BRETT

1:11:18 The JV way just because you have so many forums and it sounds like we're a little bit restricted on the budget.

--- Pricing ---

BRETT

1:11:23 Like you said you spent 1,200 dollars, but that form for data square for one custom form, that one hit you hard. Realistically what you're telling me with the amount of forms you guys have, it's gonna be pricing there's no way around it.

EUGENE

1:11:34 It's just, you know, it's one thing.

--- ST app contracts and pricing ---

EUGENE

1:11:36 If a customer, it's one thing. If a customer signs up for a yearly maintenance contract, then yeah, absolutely. It's not a problem. Make the form, pay the money. You'll make it back on the service contracts, not an issue, but we have like all gam plasma, for example... yeah, we have a contract with them, but, you know, contract here, contract there. Just because it's sign doesn't mean it means anything?

--- Pricing ---

BRETT

1:12:02 Yeah. And that's the same reason you're dealing with cash flow, you have a contract with them. They're still not paying you on time?

EUGENE

1:12:09 Exactly, you know? So all of that being said?

BRETT

1:12:13 You...

KURT

1:12:14 Have to...

EUGENE

1:12:14 Look, you have to look at that. How much these things cost you're not signing a 1,000,000 or 2,000,000 dollar contract here. You know, it's 120 30 40 K a year. It wouldn't make sense if they default or if we fall, it doesn't make sense to show anybody on this, right? So onboarding a customer investing thousands of dollars to onboard a customer, and if they decided turnaround, they have a bad day or whatever it is.

--- *Forms* ---

EUGENE

1:12:40 You know, there goes that investment that we are, if we, right? Where, if we have the ability to make our own forms, let's say the office can go in and make their own form. The RC, let's say away... that's a whole separate story... is that we can we spend our labor out... or no? But then what would populate the template... that was for?

BRETT

1:13:09 So, with diversity version, a lot of where the price comes from on, that is us doing the programming on the back end. You saw how user friendly filling out that form was through divided magic, which is what run service forms. If you want this type of form, it's a lot of time and a lot of money for my team to do the programming on the back end. So, it does reflect in this mobile friendly interface, if you were open to just using the blank paperwork, which would be similar to how you said before, you know, in the office picks the form the text gonna fill out attaches it to that job, you would save a lot of money. Your forms would still be there. You just wouldn't have the digital handcuffs.

KURT

1:13:53 Or Eugene, you went with the varsity version and you had a template that maybe rather than adopting every new customers checklist, you can say, hey, listen, this is gonna, you know... account for every one of the, you know, checks that you need in terms of... for that specific asset, right? I can't imagine and tell me if I'm wrong, you're doing where the questions really vary across customers, the checklist.

--- *Type of work* ---

EUGENE

1:14:26 Well, realistically, our regular, a regular, everyday, a regular every day is the same form. Realistically. The question comes in with the specialty customers, right? Because these plasma centers, medical facilities that we do, they are... the rest of the regulated.

KURT

1:14:46 Right, right.

EUGENE

1:14:48 So that being said, they're not... hold on.

--- *Forms* ---

KURT

1:14:55 Yeah, they're out.

EUGENE

1:14:58 You know, like they have this all again plasma for example, works through and WR, north west refrigeration, north west refrigeration keeps their compliance there for users or service contracts or maintenance. We technically are contracted to all gam via and W. R. So I have to submit that form the way it is for fda inspection and W, or inspection et cetera. Right?

--- *Type of work* ---

KURT

1:15:24 Yup.

BRETT

1:15:25 How many of your specialty our customers like Oregon?

EUGENE

1:15:32 I have about 20 to 23 customers like that.

KURT

1:15:37 And are all the forms pretty much the same or do they vary?

EUGENE

1:15:41 No, they're different. All of Olive garden has one form. Red lobster has another form. A Macy's has another one signed. The properties group has another one. H and em has another one.

--- *Forms* ---

KURT

1:15:52 Yeah, but those aren't technical as the all gam right? This fda required seems a little bit more technical than the generic retail or wholesale whatever restaurants.

EUGENE

1:16:04 I mean, they...

KURT

1:16:06 You, you'd...

EUGENE

1:16:07 Be surprised how nitty gritty technical they want us to get... you know, and it's not so much, it's not so much because of the, of a requirement that, you know, the local health department is going to check them. It's to keep track of what's being done to keep a certain brand standard. And you'd be surprised how in over time from there... gotcha. So in that case, what we do is we send the guys ad with a printed form as backup, and then we basically give them a favorable PDF.

--- Paper process ---

EUGENE

1:16:39 The amount of mistakes on these things is ridiculous. You know, like I said... three three all gam centers were inspected. I'm sitting here fixing errors all day and transferring everything over. So, I'm trying to see if I can, you know, invest to alleviate some load off myself.

BRETT

1:16:58 So, it sounds like the, you know, the biggest pain for you. What I'm hearing is they're doing it on paper. You're in the office trying to, you know, figure out what they wrote the chicken scratch and then typing it out what I'm sorry?

EUGENE

1:17:10 They're also missing information.

BRETT

1:17:12 Gotcha. So, I...

EUGENE

1:17:14 My, that's my biggest issue.

BRETT

1:17:17 Yeah. The only way we can help you there is service forms, varsity.

--- Paper process ends ---

BRETT

1:17:23 It's just gonna come down to what are you willing to spend? We do have the concept of stand... go ahead.

EUGENE

1:17:33 I spoke to, I spoke to BuildOps this morning. I told him that I need another... right? Because my original deal with them. Is this due on receipt nonsense doesn't work for me? We're a commercial company, your commercial supposedly commercial specialized company, net 30 billing should be okay. It's just send me an invoice, right? So I told them I need another week and a half the pain because we had this meeting. If you can please go to your forms team and ask them what it would cost to digitize that form with the digital handcuffs program at this way, at the end of the service order, when my tickets printed populates that form.

--- Pricing ---

EUGENE

1:18:09 Let me know what it is. It may be a number that I'll say totally completely okay with... you know, it's just, I don't know like I said, Davis, where it took a, took 1,200 dollars four months and did a shit job. Okay? Guys. Let's say, come back hypothetically speaking, you know, you need 400 bucks to put this form and it's gonna take you a week. Hell. Yeah, I'll definitely go with that, you know, as long as their support forward, where if the form doesn't work, we fix it and there's no additional charges for it, you know, they messed up the form. I paid them 1,200 dollars. It took them four months. They have to patch the software and the form gonna work properly either. And they said we're all we're going to Bill you more money to fix the form that they fucked up in the first place.

BRETT

1:18:53 Yep. I can definitely go get you a price for that. I'm sorry?

EUGENE

1:18:58 Yeah, no, you're fine. Listen, I'm not gonna pay BuildOps. I'm gonna have by myself more time. Let's do what it is. You know, if it's worth the investment I'm down.

--- Forms ---

BRETT

1:19:10 Okay. And then just to show you... how that reflects on the back office, I just wanna make sure you get the full picture, this is the form I filled out. Obviously, it would be your form. But here's how I was marketing, yes, as a nose that's how it reflects... and say your system information, what I'll fill in because you would have it inside your service trade account. But is this kind of what you're looking for right here?

EUGENE

1:19:36 Yeah, that's exactly it... for 95 percent of our calls. One form like this would be perfectly fine.

BRETT

1:19:45 Yeah.

EUGENE

1:19:46 But, you know, the issues again, when we do PM to different form, when we do PM for some customers, it's a different form where this would be a great form for regular service work, right? But then you have the PM form. You have the various PM forms for different customers, boy their inspection forms, et cetera. You may be right? It may, I may just have to, you know, stick with the JV version and that.

BRETT

1:20:14 Tam, well, I'm definitely gotta get, gotta go get a price for you on this farsi version. With the JV version, you would not have that upfront cost. Your office staff could still dispatch the correct form to the technician, would not have to hand write it. You. The only thing is you don't have those digital handcuffs... right?

--- *Forms ends* ---

BRETT

1:20:37 So if you promise me that you're not going to cut the check to BuildOps while I go figure this out for you, I will fast track it and I'll try to get an answer as soon as I can.

EUGENE

1:20:44 How long? How long is it gonna take you to fast track?

BRETT

1:20:47 I don't know. I'm gonna, I'll get off this meeting on Monday?

EUGENE

1:20:50 No, I'm sorry, I was, I got stuck on super for a second. I was looking at a picture from that, one of my text suddenly. How long do you think you, it would take to get a response?

BRETT

1:21:00 I need like 24 hours just because it's yeah, I have a cloud.

EUGENE

1:21:04 That's not a problem. Please. You got, if you can give me an answer by Friday, I'd be happy.

BRETT

1:21:09 Answer by Friday. I can definitely do that. If they wanna talk to you, the forms team wants to talk to you about some things as far as what you're looking for on these forms. Would you be open to meeting with me in the forms team this week?

EUGENE

1:21:21 Yeah, absolutely.

KURT

1:21:25 And, and if you do talk to BuildOps, I would ask them and I know you kind of spoke to this. I would ask them to show you in real time and not in some screenshots their version in a PDF form, not being able to use that... a fail-safe in terms of getting a signature before they close out of that job.

--- Tech On-site ---

KURT

1:21:50 I would say, you know, I say, I think that's great. But I just love to see that live. Can you show me that live? Show me how you use these, the editable PDF and how you have that specific need to get that signature before you close out? Show me how I'm not gonna show me the error when I tried to close it out without the signature, right? Okay. And the last thing I'll say agent, as far as pull through work, right? I think what's most... common in the industry now is people signing contracts that cost just to get their hands on additional pull through work, is that a fair comment?

--- ST app contracts and pricing ---

KURT

1:22:36 So, right, you have a contract. I see it with... the Amazon distribution centers going up and down, you know, New Jersey turnpike. There's a prospect we have that they'll say, okay here's, a new building here's. A service contract and they'll do it like a cost, right? They'll say we'll sign a contract to three year contract to service this new facility.

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

KURT

1:22:59 And we're gonna try and undercut the competition just to have the opportunity to be on site to quote additional pull through work.

EUGENE

1:23:10 Listen, that's the majority of the industry. You can't do. It costs because then you're... but yeah, you're basically running a 10 point profit margin.

KURT

1:23:21 Okay. As far as, right? But... it's a huge opportunity to be on site to have your text say here's more work. We can do... additional quote work.

1:23:36 Right. The problem is you gotta see who you're working with, right? It's if the chances of additional quote work are slim to none, you're not going to sign the contract that cost, you know, there's always a small, yeah, there's always a small profit, but it's there. But again, you are correct, you know, realistically, there's not a lot of there's not a lot of backing there to invest in... a solution that you may not even really get any, you know, anything out of it, you know, how much failure actually happened that are brand new building.

KURT

1:24:16 Yep. Fair comment. Fair coming. But listen, these things are exposed, you know, to the weather and shit happens, right? You know, they will break down. You know, it's rare that these things are running, you know, 24 seven smoothly. It's just when you have mechanical moving parts, ship breaks down. So the one thing that's very important and I don't know if Brett, you want to go through it or if you have more time on where we stand, but our deficiency loophole from seeing that additional potential pull through work and getting that back to the office and office quoting that out and then tracking that and getting that to additional work is approximately seven stops, seven steps give or take build ups are understanding and we haven't seen it. But our understanding from other prospects we spoken with is about 17 to 24 steps. So I don't know Brett if you want to just kinda jammed through it. I think obviously this is very important for Eugene, but the ability to generate more pull through work. Our workflow is as clean and concise as it can get.

--- Customer engagement ---

BRETT

1:25:27 Agreed. And yet, Kurt, great point that's the whole, you know, point on increasing revenue. I know you said that's not your main focus right now. The end of the day, what business owner doesn't want to grow their business by business owner doesn't want to increase their revenue. So just by, you know, your technicians, finding additional deficiencies on site.

--- Deficiencies ---

BRETT

1:25:44 So really easy way to maximize on that. So to Kurt point here's, that corroded sprinkler head deficiency that I found through service forms. The first of the version of forms in the field. From here, all I gotta do is click into it to see more information. But if I don't want my staff to be in service trade, they can also get an email notification. So I don't know if I have these setup but they can get a notification saying, hey, Brett reported efficiency, it was tied to this job here's. What he found here's, any pictures he took. And then for here, it's really easy to add this to a quote. So I can say, hey, this expires in a month.

--- Quote templates ---

BRETT

1:26:19 Let's create a quote from it. And then from here, my quote is pretty blank with quote templates. We found, yeah, it's a lot less clicks to generate quotes in service trade versus in BuildOps. So if I go, let's see. I did a quote and sprinkler head. So I have a repair for that here's. The general type of work I do for it along with the parts labor the job items I expect to use. Well, this quote is pretty much made right now because you already have your markup rules from contract pricing in here markups or their margins. Are there, you can pick the level of detail at your customer sees... save that in.

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

BRETT

1:26:56 And then it's really easy to just send it out to my customer. I actually have to put your email in here because we're on a new account.

BRETT

1:27:11 See.

BRETT

1:27:16 That's for now. So if I want to send that to my customer, it's as easy as... clicking that, tell him that are picking what I want the customer to see. So I'm gonna include that picture and sending it and you have, it sounds like you have access to your email right now. Yes, awesome. If you can pull it up, you can see exactly what your customer's going to see and see how easy it is for that customer to approve it.

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

EUGENE

1:27:48 Gotcha.

EUGENE

1:27:54 And anytime you guys... it looks good, you know, give me ones.

EUGENE

1:28:07 It looks good. I'm just if you can give me the price on that and forums.

BRETT

1:28:15 Wow, Kurt was talking. I went ahead. I submitted it to our team. I said, hey, I need an answer ASAP. I haven't looked at it yet, but I just submitted it. So give me, I say give me 24 hours and I'll have it back to you.

EUGENE

1:28:25 No, not a problem, sir, at all.

BRETT

1:28:28 Okay. That being said, like I mentioned, I might need you to jump on a meeting with my team so they can answer or ask some questions. As far as that custom form. Is there a good phone number to catch you on seven one eight?

EUGENE

1:28:42 Six, one, nine, zero, five, eight, six.

BRETT

1:28:46 Perfect. So, yes. Okay, cool. So, Eugene, do you want to continue going through the demo? Do you want us to go figure this out for you and just get back to you? What do you want to do?

EUGENE

1:28:58 Just get back to me. Listen realistically, the workflow... on all these solutions is similar. It's just it the devil's in the details.

BRETT

1:29:13 Percent...

EUGENE

1:29:14 You know, the devil's in the details that's basically it. So if you can just let me know what those phone calls because I do like visual hand cops.

BRETT

1:29:24 Yeah. And you would say all of your other custom forms are similar if not less expensive than this old.

EUGENE

1:29:32 They're other about the same. They're all pains and the assets.

BRETT

1:29:39 Okay. So, yeah, it's in there. If I don't get an answer by the morning, I'll make a call and I will put some pressure on them so I can get you an answer. And I will be in touch as soon as I get the.

--- Pricing ---

KURT

1:29:50 Hey, Eugene, just curious... what was the Bill for build out is going to be about, and how did they charge?

EUGENE

1:30:00 They wanted, they wanted to 18 K year for 10 users. So they, their packages are, you know, they have like a 10 user package... 18 K for the year. They wanted to

annual billing. All at once. My told them that's definitely not going to happen that it was going to be quarterly, but we'd be no implementation fee. So basically agreed on 4,500 a quarter. Would, no implementation fee.

KURT

1:30:31 And how quickly they... anticipate...

EUGENE

1:30:37 They said I'd be live by January third.

BRETT

1:30:46 Okay. I very much Eugene.

KURT

1:30:52 You about 17 text. Is that right?

EUGENE

1:30:56 No, no, no. We're down to seven service techs. Everybody else has an installer. We used to. I used to have 35, I'm down to seven, but obviously, the idea is to keep going back to the original number before COVID.

--- Purchase decision ---

KURT

1:31:12 Right.

BRETT

1:31:15 So, I think Eugene a reason Kurt and I are a little skeptical of BuildOps is we've obviously pulled some customers off of there and we've heard they're honest opinions. I won't talk bad about them, but I very much encourage you to go talk to our reference because it sounds like they're saying yes to every question you ask them. And I think Kurt and I know that's not necessarily the truth.

--- Purchase decision ends ---

EUGENE

1:31:37 That's fine. That's fine. Listen, after this meeting, I have a ton of questions for him.

BRETT

1:31:42 Good. I'm good. So let me get to work like Kurt nine zero thing, I will give you a call on that. So once I have an answer for you... and we'll go from there as far as what you want to jump into next.

EUGENE

1:31:56 You got it. Sounds good. Thank you very much gentlemen.

BRETT

1:31:58 Absolutely.

EUGENE

1:32:01 That's a great thank you.

BRETT

1:32:02 You as well. Take care.

The End